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# CAREER & TECHNOLOGY STUDIES

## Meetings and Conferences

## TOU 205

Distance Learning

Alberta
EDUCATION

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# Meetings and Conferences

## TOU 205

Distance Learning

Alberta
EDUCATION

Tourism Studies 205
Meetings and Conferences
Student Module Booklet
Alberta Distance Learning Centre
ISBN 0-7741-1290-5

| This document is intended for | |
|---|---|
| Students | ✓ |
| Teachers (Tourism Studies 205) | ✓ |
| Administrators | |
| Parents | |
| General Public | |
| Other | |

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# Welcome!

Welcome to TOU 205.

We hope you'll enjoy your study of
*Meetings and Conferences.*

CTS Strands were designed to stand alone or be integrated with other strands for a customized course of studies to meet student needs. Through each strand, CTS basic competencies (knowledge, skills, and attitudes) will be identified as follows:

**Careers:** identify appropriate career linkages within the strand being studied

**Communication:** effectively present concise written, visual, and oral communications

**Ethics:** identify and demonstrate appropriate ethical behaviour, consider risks, and process and assess choices

**Innovation:** recognize opportunities/problems, consider risks, and process and assess choices

**Risk Management:** recognize and follow personal and environmental safety procedures

**Task Management:** demonstrate an ability to locate and use resources and to use time effectively

**Teamwork:** work towards goals cooperatively, collaboratively, or independently and acknowledge the opinions of others

**Technology:** effectively use technology when required

These basic competencies build daily living skills useful in a broad range of future endeavours and careers.

The eight icons that appear here indicate to both students and facilitators that a basic competency has been identified in the activity offered to the students. Not all of the icons appear in each module.

## Resources You Will Need

In order to complete TOU 205, you will need access to the following resources:

- the course textbook, *Tourism and Travel: Focus Canada*, fourth edition, written by Veronica Timmons and published by Getaway Publications Inc., Vancouver
- a notebook or binder in which to respond to questions asked in this Student Module Booklet

As well, you should try to obtain access to at least some of the following optional resources. Your tourism studies teacher, careers counsellor, and/or school librarian should be able to help you locate them.

- *Tourism: Joining Alberta's Best—Resource Kit*, produced by the Alberta Tourism Education Council and the Tourism Industry Association of Alberta (along with the videotape *Joining Alberta's Best*)
- *The Yellow Brick Road: Your Career in Hospitality and Tourism*, published by Kostuch Publications, Toronto
- *The Student's Travel Map: A Guide to Tourism Careers, Education and Training*, produced by the Canadian Tourism Human Resource Council, Ottawa and the Pacific Rim Institute of Tourism
- *Check It Out! Is There a Tourism Career in Your Future?* produced by the Alberta Tourism Education Council
- a VCR

**Note that you will be required as part of this course to do outside research and to help plan, carry out, and evaluate an actual meeting or event.**

## Visual Cues

In addition to the Career and Technology basic competencies icons described earlier, you may find visual cues throughout the Student Module Booklet to assist you in your studies. Read the following explanations to discover what each icon prompts you to do.

Focus Canada

Read your textbook.

Listen to an audiocassette.

View a videocassette.

Access the Internet
if you have that capability.

# Tourism Studies

## OVERVIEW

| Introductory | Intermediate | Advanced | |
|---|---|---|---|
| TOU 101 The Tourism Industry<br>TOU 102 People and Places<br>TOU 103 Quality Guest Service | TOU 201 Tourism Events | | –THEME– Nature of the Industry |
| TOU 104 Tourism Food Sector | TOU 204 Food Functions | TOU 303 Food Service Operations | –THEME– Food |
| TOU 105 Tourism Accommodation Sector | TOU 205 Meetings and Conferences | TOU 304 Hotel/Motel Operations<br>TOU 305 Alternative Accommodations | –THEME– Accommodation |
| TOU 106 Tourism Travel Sector | TOU 206* Tourism Destinations I<br>TOU 207 Tourism Destinations II<br>TOU 208 Travel Planning | TOU 306 Travel Agency Operations<br>TOU 307 Airline Reservations<br>TOU 308 Tourism Air Transportation<br>TOU 309 Tourism Surface Transportation | –THEME– Travel |
| TOU 107 Tourism Attractions Sector | TOU 209* Tourism Interpretation I<br>TOU 210 Tourism Interpretation II | TOU 310 Attractions Operations<br>TOU 311 Adventure and Ecotourism | –THEME– Attractions |

* TOU 206 is a prerequisite to TOU 207
* TOU 209 is a prerequisite to TOU 210

Some of these modules may not yet be in a distance learning format.

# CONTENTS

Overview ........ 1
- Evaluation ........ 2
- Strategies for Completing a Module ........ 2

## Section 1: The Business of Meetings and Conferences

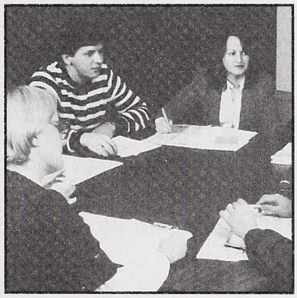
PHOTO SEARCH LTD.

Activity 1: Meetings, Conferences, and the Tourism Industry ........ 4
Activity 2: Different Types of Meetings ........ 11
Activity 3: Planning Meetings—An Overview ........ 15
Activity 4: Site Selection ........ 17
Follow-up Activities ........ 23
- Extra Help ........ 23
- Enrichment ........ 25
Conclusion ........ 27
Assignment ........ 27

## Section 2: Planning Meetings and Conferences

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Activity 1: Developing a General Meeting Plan ........ 30
Activity 2: Working with Your Resources ........ 34
Activity 3: Developing an Agenda ........ 38
Activity 4: Developing a Marketing Plan ........ 42
Activity 5: The Organizers' Meeting Plan ........ 47
Activity 6: Working Out a Budget ........ 52
Activity 7: Evaluating the Meeting ........ 56
Follow-up Activities ........ 59
- Extra Help ........ 59
- Enrichment ........ 61
Conclusion ........ 63
Assignment ........ 63

## Section 3: Job Opportunities in Meetings and Conferences

WESTFILE INC.

Activity 1: Researching Employment Opportunities ................ 66
Activity 2: Researching Training and Education ................ 72
Activity 3: Are You the Right Person for the Job? ................ 76
Follow-up Activities ................ 78
  Extra Help ................ 78
  Enrichment ................ 81
Conclusion ................ 83
Assignment ................ 83

Module Summary ................ 84

## Course Survey

## Appendix

Glossary ................ 86
Suggested Answers ................ 87

# Meetings and Conferences

## OVERVIEW

Have you ever been involved in the planning of a party or some other special event? If so, you know it takes a lot of effort. For any type of occasion to be successful, careful attention to details must be considered—location, date, time, number of guests, entertainment, refreshments, and cost. Effective communication and good organizational skills on the part of the planners are keys to a successful and enjoyable event.

Planning meetings and conferences is very similar to planning your own party but on a larger scale. Just as you and your friends meet to exchange news and share interests, businesses also get together to do this sort of thing but in a more formal setting and on a more elaborate scale.

In this module you'll learn the whys and hows of planning meetings and conventions. Section 1 will give you a general introduction to the process while in Section 2 you'll learn and put to use some of the basics of planning. Finally, in Section 3 you'll learn how to research employment and training opportunities in the meetings and conventions business. This should serve as good preparation if you think a career in this part of the tourism industry might be right for you.

**TOU 205: Meetings and Conferences**

**Section 1: The Business of Meetings and Conferences**

**Section 2: Planning Meetings and Conferences**

**Section 3: Job Opportunities in Meetings and Conferences**

## Evaluation

The document you are presently reading is called a Student Module Booklet. It will show you, step by step, what to do and how to do it.

This module, Meetings and Conferences, has a value of one credit. It's made up of three sections. Within each section, your work is grouped into activities. Within the activities there are readings, explanations, and questions for you to work through. You'll correct these activities yourself using the Appendix at the end of this module. The suggested answers contained in the Appendix will provide you with immediate feedback on your progress.

Your grading in this module is based upon the assignments that you submit for evaluation and upon a final test. You must complete all assignments. In this module you're expected to complete three assignments, one after each section. The mark distribution is as follows:

| | |
|---|---|
| Section 1 | 30 marks |
| Section 2 | 40 marks |
| Section 3 | 30 marks |
| **Total** | 100 marks |

## Strategies for Completing a Module

Organize your materials and work area before you begin: Student Module Booklet, textbook, workbook, pens, pencils, and so on. Make sure you have a quiet area in which to work, away from distractions.

Because there are no response lines provided in the Student Module Booklet, you'll need a notebook or lined paper to respond to questions and complete charts. It's important to keep your lined paper handy as you work through the material and to keep your responses together in a notebook or binde for review purposes later.

To achieve success in this module, be sure to read all your instructions carefully and work slowly and systematically through the material. Remember, it's the work you do in this Student Module Booklet that will prepare you for your assignments and final test. Try to set realistic goals for yourself each day; and once you've set them, stick to them. Submit your assignments regularly, and don't forget to review your work before handing it in. Careful work habits will greatly increase your chances for success in Tourism Studies.

Good luck!

**Note carefully that for the Section 2 Assignment you must participate in planning, putting on, and evaluating an actual meeting or event. This will involve arranging with some group—such as a school club, church youth group, or community service organization—to assist with the various processes involved in putting on some sort of organized event. It would be a good idea to read over your Section 2 assignment now and start making the necessary arrangements to carry out the assigned tasks.**

# The Business of Meetings and Conferences

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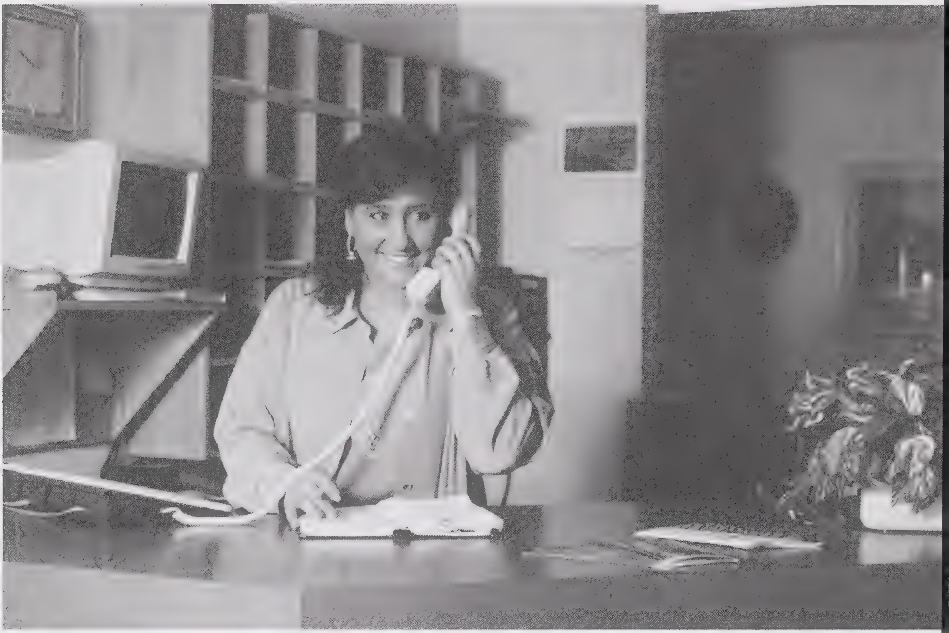
HAVE you attended many meetings in your life—while serving on school committees, perhaps? Have you ever been to an organized get-together as part of a group such as the Boy Scouts or Girl Guides? The fact is that organized meetings of all shapes and sizes are a way of life in our society, and in the business world they're often vital to keeping things focused and running smoothly.

For meetings, conferences, and conventions to be successful, many people have to get involved—in establishing ideas, developing plans, making arrangements, and putting the plan into action. If you've ever organized an event—even a small social one—you know how much work is involved. Now imagine that magnified thousands of times over.

When you've finished Section 1, you should be able to explain the importance of meetings, conferences, and conventions to the tourism industry. As well, you should be able to list a variety of meeting types and describe how they're planned. Finally, you should be able to explain the process of selecting sites for meetings and the factors that must be taken into account in this process.

## ACTIVITY 1

# Meetings, Conferences, and the Tourism Industry



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## The Eight Sectors of the Tourism Industry

**tourism:** *an activity in which people visit places and other people outside their own communities (except for daily commuting)*

**tourism industry:** *the collection of businesses and organizations that provide products and services for travellers*

If you've taken other modules of Tourism Studies, you'll have some ideas about **tourism** and the **tourism industry** in general, but it's possible that this is your first Tourism Studies module. In that case the first thing you'll need is a quick overview of the tourism industry in general.

What do you think of when you hear the words *tourism* or the *tourism industry*? Camping in the mountains? Dining in an exotic restaurant in Rome? Visiting family in Manitoba? Enjoying the fun and excitement of the Calgary Stampede?

Tourism means different things to different people. In fact, tourism is Alberta's third-largest industry and one of the fastest-growing industries in the world. The tourism industry includes just about any business that offers services to people who are doing things away from home—businesses that offer such things as place to stay, things to eat and drink, attractions to watch, recreational activities to take part in, and a variety of facilities in which people can meet, eat, and enjoy themselves.

For convenience's sake, this vast industry is generally divided into eight distinct sectors. These sectors are

- events and conferences
- transportation
- attractions
- food and beverage
- travel trade
- adventure and recreation
- tourism services
- accommodation

For a better idea of the sort of businesses these eight sectors include, turn to your textbook, *Tourism and Travel: Focus Canada*, and read pages 12 and 13, beginning with the heading The Eight Tourism Sectors. Study the chart on page 13 in particular.

1. With which of the eight sectors of the tourism industry will this module, Meetings and Conferences, be concerned?

No doubt you responded to the preceding question by referring to the first of the eight sectors discussed—events and conferences. This is the part of the tourism industry that concerns itself with such things as **meetings**, **conferences**, **conventions**, exhibitions, and festivals. In this module you'll be looking specifically at the part of the sector that involves planning, organizing, and staging meetings of various sizes, though later on you'll also get the chance to practise planning other sorts of events.

**meeting:** *a generic term often used to describe all sorts of group get-togethers—conventions, conferences, symposiums, and so on*

**conference:** *a large meeting in which information is exchanged, problems are tackled, and new developments are dealt with*

**convention:** *a meeting—often large and usually held at regular intervals—that normally involves group sessions, workshops, and special events*

*Typical conventions host groups such as professionals (doctors, dentists) or people in the same line of business*

## Why Meetings?

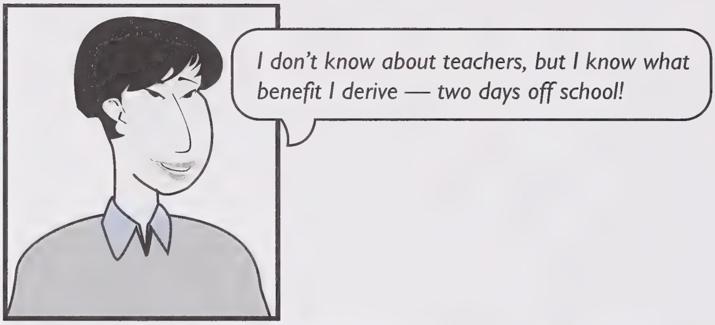
For a variety of reasons people from all walks of life need to get together to share their ideas. For instance, communicating with friends by letter or telephone—or perhaps over the Internet—is very pleasant; but it's more fun, and often more productive, when you can get together and share your news. Face-to-face contact is always more personal, and this is how the business community sees things too. When people get together through joint effort, usually they can achieve many goals that would be unattainable individually. The events-and-conferences sector of the tourism industry recognizes this and works with members of the business community to ensure that their clients' needs are satisfactorily met.

To learn more about business get-togethers, turn to page 196 in your textbook and read the section entitled Why They Meet. Then answer the questions that follow.

2. According to the text, what benefits do people and organizations derive from holding meetings such as conventions?

3. Many groups of professionals and business people hold conventions annually. What groups are you aware of that do this?

4. If you're like most students, you mentioned teachers in your answer to question 2. Most students take teachers' convention for granted, but have you ever stopped to think about it? Suggest a number of benefits teachers likely derive from attending an annual convention.


I don't know about teachers, but I know what benefit I derive — two days off school!

**Compare your answers with those in the Appendix, Section 1: Activity 1.**

## Who Has Meetings?

You've begun thinking about what sorts of groups hold meetings of various kinds and why they have them. To dig a little deeper, read all of pages 194 and 195 of your textbook along with the grey sidebar at the top of page 196 (about a Star Trek convention). When you've finished, answer the following questions.

5. According to the text, why are large meetings like conventions and **congresses** more common today then ever before?

6. The text lists four types of organizations that regularly hold large meetings. List these types of organizations and for each type give a specific example of a meeting.

7. Your text points out that members of **associations** usually pay their own way to conventions. Why would they willingly incur such an expense?

**Compare your answers with those in the Appendix, Section 1: Activity 1.**

**congress:** *a formal conference that attracts delegates from a number of countries*

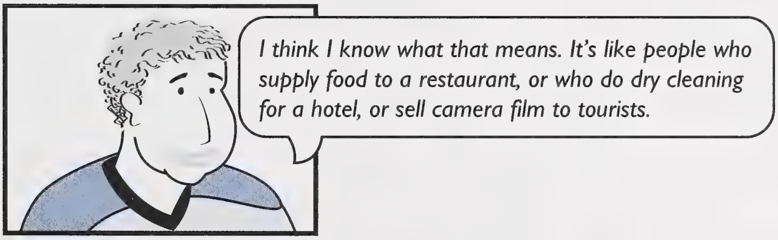
**association:** *an organized group of people sharing the same interest or belonging to the same profession*

## The Benefits of Meetings—The Larger Picture

The events-and-conferences sector of the tourism industry is the collection of businesses that supply the buildings, facilities, personnel, and expertise needed to allow organizations to hold large meetings of the sorts you've been looking at. But before getting into the nuts and bolts of planning and organizing these kinds of meetings, it's important for you to realize that this one sector of the industry doesn't act alone. After all, the people who attend a large meeting all have to get to wherever it's being held; that involves the transportation sector. And these people have to eat and, very likely, stay somewhere; that involves the food-and-beverage and accommodation sectors. The fact is that many businesses throughout the tourism industry benefit when conventions, conferences, and other large meetings take place.

But that's not all. Other businesses, not directly involved in tourism at all, also benefit whenever a large meeting is held in their community. These are the **indirect suppliers**—businesses that supply the goods and services that businesses within the tourism industry need.

▼
***indirect suppliers:*** *businesses that play a role in the tourism industry by supplying subsidiary services*
▲


I think I know what that means. It's like people who supply food to a restaurant, or who do dry cleaning for a hotel, or sell camera film to tourists.

You should now be able to see why you sometimes hear in the news of communities that are trying to dream up new ways to attract more conventions—by building better facilities, running expensive advertising campaigns, sprucing up the downtown core, and so on. Whenever conferences or conventions are held, a good deal of money finds its way into the pockets of many of the people who live in the area.

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Turn to page 14 of your textbook and read the section entitled Indirect Suppliers. Be sure to examine the diagram at the end of this section. Then turn to page 193 and read the Overview. When you're finished, answer the questions that follow.

8. Imagine that a convention is to be held in your own community.

   a. List several of the businesses and companies in the tourism industry that are likely to benefit. Be as specific as you can.

b. Now list several businesses outside the tourism industry that are also likely to benefit. Once again, be specific.

**Compare your answers with those in the Appendix, Section 1: Activity 1.**

Task Management

9. Before completing this activity, there's one more thing you'll have to do. Doing this task now will ensure that you'll be able to complete an activity in Section 3 and do your Section 3 assignment.

The task is to contact seven or eight postsecondary (after high school) institutions in Alberta and ask for information on any programs and courses they offer that relate to the events-and-conferences sector of the tourism industry. You can find the addresses of institutions offering tourism courses in several publications that your school library, careers counsellor, or tourism studies teacher may have. Two such publications are

- *The Student's Travel Map*, produced by the Canadian Tourism Human Resource Council

- *The Yellow Brick Road*, published by Kostuch Publications of Toronto

If you can't get hold of a listing of appropriate institutions, here are a few addresses you can try:

- The Career College
  (Calgary)
  200, 206–7th Avenue S.W.
  Calgary, AB
  T2P 0W7
  Tel: (403) 232-6410
  Fax: (403) 265-7679

- Lethbridge Community College
  3000 College Drive South
  Lethbridge, AB
  T1K 1L6
  Tel: (403) 329-7284
  Fax: (403) 320-1461

- Grant MacEwan Community
  College
  10700–104 Avenue
  Edmonton, AB
  T5J 4S2
  Tel: (403) 497-5251
  Fax: (403) 497-5200

- Keyano College
  (Clearwater Campus)
  8115 Franklin Avenue
  Fort McMurray, AB
  T9H 2H7
  Tel: (403) 791-4800
  Fax: (403) 791-1555

- Red Deer College
  Box 5005
  Red Deer, AB
  T4N 5H5
  Tel: (403) 342-3300
  Fax: (403) 340-8940

- Alberta Vocational College
  (Calgary)
  332–6th Avenue S.E.
  Calgary, AB
  T2G 4S6
  Tel: (403) 297-3930
  Fax: (403) 297-4081

- University of Alberta
  Faulty of Physical Education
  and Recreation
  Edmonton, AB
  T6G 2H9
  Tel: (403) 492-2759
  Fax: (403) 492-2364

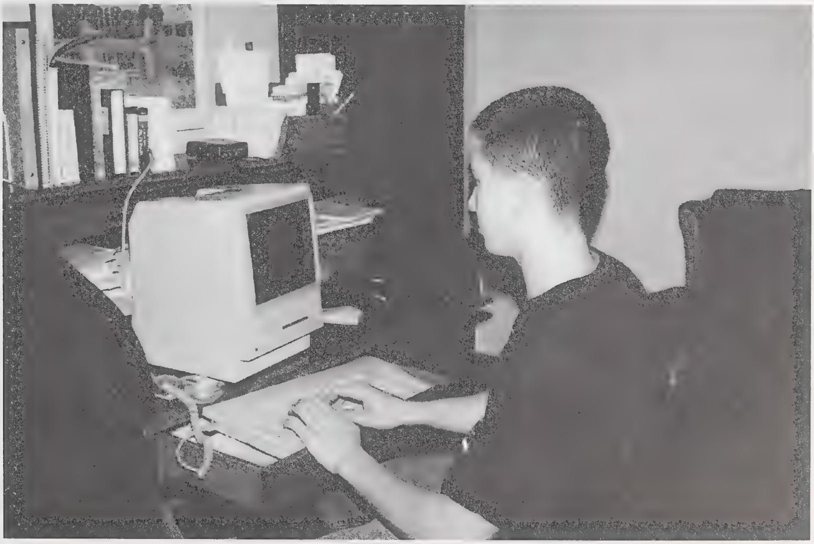
- University of Calgary
  World Tourism Education
  and Research Centre
  Scurfield Hall
  Calgary, AB
  T2N 1N4
  Tel: (403) 220-8310
  Fax: (403) 282-0095

- Mount Royal College, Faculty
  of Continuing Education
  4825 Richard Road S.W.
  Calgary, AB
  T3E 6K6
  Tel: (403) 240-6861
  Fax: (403)240-6670

- Alberta Vocational College
  (Lesser Slave Lake)
  General Delivery
  Grouard, AB
  T0G 1C0
  Tel: (403) 751-3915
  Fax: (403) 751-3825

- Southern Alberta Institute of
  Technology
  Hospitality Careers Department
  1301–16 Avenue N.W.
  Calgary, AB
  T2M 0L4
  Tel: (403) 284-8612
  Fax: (403) 284-7034

You can make your request by phone, mail, fax, or, if possible, the Internet. If you decide to write, simply produce a short (to-or-three-sentence) business letter asking for the information. If you have access to a computer, you can create a template and simply insert the correct address for each letter. If you're unsure of how to structure a business letter, use the following sample as a guide (but note that your own letter should be much shorter).



## Sample Business Letter

Return Address
(Your Address)

Box 1492
Midville, AB
X0X 0X0
June 11, 1996

Inside Address
(Person receiving
the letter)

Mr. Jacques Letendre, Registrar
Canada College
12345 – 123 Street
Large Centre, AB  0X0 X0X

Salutation

Dear Mr. Letendre:

This is the correct format to use when you write a letter for this module. Please make sure that you follow it very closely.

Notice that the return address is followed immediately with the date. All letters must be dated. Leave four or five spaces between the return and inside address. Leave one empty line before the salutation (Dear . . .); then follow the salutation with a colon.

If you don't know the name of the individual to whom you're writing, put his or her title or position in the inside address if possible. Then, for the salutation, write "Dear Sir or Madam:"

Leave one empty space before you begin the body of the letter. Paragraphs are not indented. Leave one blank line between each paragraph.

Before the complimentary closing (Sincerely,) leave one more blank line. To ensure that you have enough room to sign your name, leave four-to-six spaces between the complimentary closing and your name.

Complimentary
Closing

Sincerely,

Signature

*Janice Owen*

Janice Owen

When you receive your replies, be sure to save them. You'll be using this material in Section 3.

In this activity you've looked at the business of conventions, conferences, and other large meetings from a broad perspective; you've seen the sorts of groups that hold them and you've examined some the reasons they're held and the benefits they bring about. In the next activity you'll look more closely at some of the different types of meetings you're likely to encounter in the events-and-conferences sector of the tourism industry.

## ACTIVITY 2

# Different Types of Meetings

Conventions. Conferences. Congresses. Are you feeling a bit confused about the various types of meetings you've been reading about? This activity will look more closely at the main types of meetings with which the events-and-conferences sector of the tourism industry concerns itself. When you've finished the activity, any confusion you may have been experiencing should be cleared up.

But first, what do you already know? You know that many groups and organizations hold meetings to get together, share ideas, and look at different issues. Political parties, corporations, professional associations, special-interest groups, charity organizations, sports groups—the list of potential meeting holders goes on and on. Sometimes groups like these will convene meetings at regular intervals; sometimes they'll call meetings because of specific issues or problems.

But whatever the reasons, the meetings generally have far-reaching benefits, extending at least to

- the group or organization itself—and its individual members
- the businesses in the events-and-conferences sector that directly supply services and facilities to the meeting
- businesses in other sectors of the tourism industry—such as transportation and accommodation
- indirect suppliers to businesses in the tourism industry
- the entire community in which the convention is held

But meetings have very different purposes and formats. The following examples should make this clear.

- Physicians from all over the country wish to get together to discuss and learn about a new surgical procedure. They decide to hold a *conference* in Winnipeg—a centrally located city—and invite as guest speakers the surgeons who developed and pioneered the technique.
- Members of a variety of environmental groups feel the need to get together to learn more about recent discoveries on topics like the depleting ozone layer, global warming, and the destruction of the rain forests. They arrange a formal meeting where guest speakers with expertise in these areas can debate the latest developments. This meeting will be a **symposium**.
- A charitable organization likes to hold a meeting for all its Canadian members once a year to discuss issues, share problem-solving ideas, and improve its employees' knowledge and understanding of the organization, its goals, and its people. The organization holds an annual *convention* in a different Canadian city each year.
- A small community is concerned that few people in the area are trained in the basics of first aid and CPR (cardio-pulmonary resuscitation). So a **workshop** is arranged and a qualified instructor is brought in to teach these things and give interested people a chance to practise the techniques they're learning in a hands-on situation.
- The Comfy Chair Company feels that its employees could do a better job in selling its products, so it arranges a **seminar** in which sales experts will meet with the employees to try to teach them better sales techniques. The small size of a seminar should allow each employee to receive some individual attention.

**symposium:** *a formal meeting in which several expert speakers speak on and debate a topic or a variety of related topics*

**workshop:** *a hands-on training session that usually involves both instruction and participation*

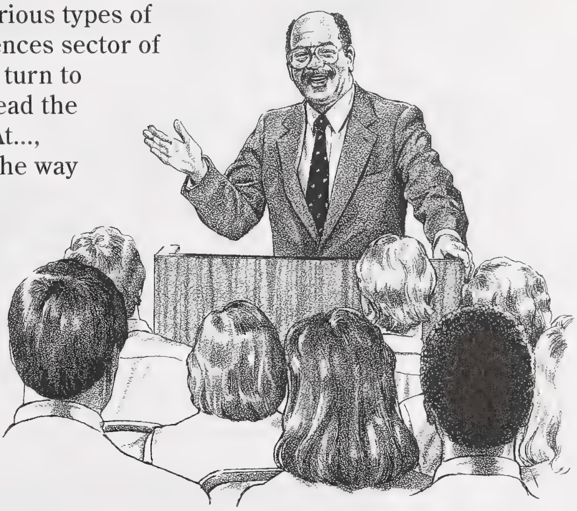
**seminar:** *a short educational session, normally involving a relatively small number of participants*

- Members of a particular religious denomination gather from all over the world at a large, formal meeting to try to develop a common policy on the question of euthanasia. Such a meeting is often called a *congress.*

- A variety of businesses in the Edmonton area who buy, sell, and repair antique furniture decide to get together for a three-day **exhibition** to raise public awareness of themselves and their products. Exhibitions and **trade shows** of this sort can bring buyers and sellers together in an informal, almost fair-like atmosphere that families can enjoy as an afternoon's recreation.

**exhibition/ trade show:** *a large event that involves people in a particular line of work or sharing a particular interest getting together and displaying their products to the public*

To learn a bit more about the various types of meetings the events-and-conferences sector of the tourism industry deals with, turn to page 197 of *Focus Canada* and read the section entitled What They Do At..., which ends about two-thirds of the way down page 198. When you've finished, answer the questions that follow.



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1. Here's a list of different types of meetings. Use this list to identify each of the meetings described after it.

   - convention
   - symposium
   - workshop
   - seminar
   - exhibition/trade show
   - congress
   - conference

   a. University professors from across the country gather to hear a formal debate and exchange of ideas on the topic of the political theory of a well-know philosopher.

   b. The sales staff at a small computer software business meet to learn how to use the new software that they'll soon be selling. They'll receive instruction and be given the chance to practise what they've learned.

   c. Insurance sales people from across Alberta have their annual meeting in Banff to listen to speakers, attend sessions, and exchange ideas.

   d. Businesses involved in various aspects of home decorating rent a large arena in a city and invite the public to come down and see their displays.

**delegate:** *a person attending a meeting, often representing a specific company or organization*

e. Women's rights groups from all over the world send **delegates** to a week-long meeting in Geneva to exchange ideas and possibly hammer out common positions on a few contentious issues.

f. All the senior high social studies teachers in a rural school jurisdiction get together on a Saturday to learn about some proposed curriculum changes.

g. A large chain of retail clothes outlets calls a meeting of its store managers throughout the province or country to attend a special three-day meeting to discuss marketing strategies for the twenty-first century.

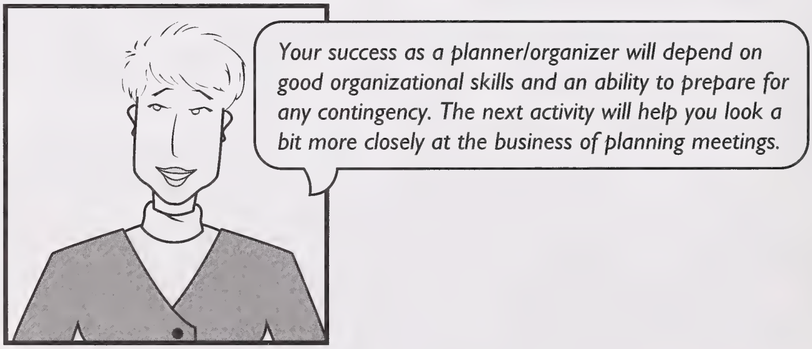
**Compare your answers with those in the Appendix, Section 1: Activity 2.**

If you had a few problems with the preceding questions, don't worry too much; these labels are usually applied rather loosely, and often one name will be used when another might be just as accurate—or perhaps more accurate. In fact, throughout this module the words *conference* and *convention* will often be used interchangeably to refer in a general sense to any large meeting that requires professional planning. What's important here is that at this point you should have a good understanding of the variety of meetings that a conference planner in the events-and-conferences sector of the tourism industry could be called upon to help put together.

2. Before going on, think for a moment of your own community. What types of meetings are held in it or the surrounding area? Be as specific as you can.

**Compare your answer with the one in the Appendix, Section 1: Activity 2.**

The fact that you're taking this course probably means that you're at least vaguely interested in looking into career possibilities as a meeting planner and organizer. Remember that when a meeting planner fulfils his or her customers' needs, the result is satisfaction and—more than likely—repeat business.


Your success as a planner/organizer will depend on good organizational skills and an ability to prepare for any contingency. The next activity will help you look a bit more closely at the business of planning meetings.

## ACTIVITY 3

# Planning Meetings —An Overview

If you've ever been involved in organizing an event of some sort, you can probably well imagine that people in the business of professionally planning and organizing meetings have many responsibilities. Not only must they think of the thousands of practical problems that must be dealt with, but they also have to always bear specific customer expectations in mind and try to satisfy them. To ensure a successful meeting, planners must be able to work with a broad range of businesses, both within and outside of the tourism industry, to see to it that every detail has been thought of and prepared for.

## People Who Plan Meetings

Focus Canada

To take a quick look at someone involved in the planning of conferences, turn to page 200 of your textbook and read Focus on Coordinator. Then answer the questions that follow.

1. The passage in your textbook that you've just read looks briefly at the job of Maria Salida, a conference coordinator employed by a conference service company. In a short paragraph describe her job and responsibilities.
2. With whom does a conference coordinator work directly?
3. List three personal qualities that a conference coordinator should have to succeed in his or her job.

4. Do you think you might have the qualities necessary to become a conference coordinator? Why or why not? Be honest!

**Compare your answers with those in the Appendix, Section 1: Activity 3.**

## The Business of Planning Meetings and Conferences

As Maria Salida has described it, the job of conference coordinator has many challenges, but the rewards involved in putting on a successful conference and being thanked by grateful clients makes the effort all worthwhile. But now that you've taken a personal look at someone in the business of planning large scale meetings, it's time to look more closely at some of the other players in the game of staging events of this sort.

Focus Canada

5. The section of your textbook entitled Who Are the Suppliers? on pages 198 to 199 and 201 to 202 runs through some of the organizations and businesses involved in organizing conferences. Read these pages carefully; in fact, they'll probably require at least two readings. Before you do your reading, construct a chart in your workbook like the one that follows. As you read, fill in the chart. It's been begun to get you started.

### ORGANIZATIONS INVOLVED IN CONFERENCE PLANNING

| Organization | Description | Function |
|---|---|---|
| **Convention Planners** | *small volunteer groups or professionals* | *plan conventions—sometimes move to the chosen location to do this* |
| **Convention Centres, Hotel/Resorts** | | |
| **Convention Service Companies** | | |
| **CVAs** | | |
| **Airlines** | | |
| **Governments** | | |

**Compare your chart with the one in the Appendix, Section 1: Activity 3.**

Now that you've completed your chart, you should find it easier to see just where Maria Salida's job fits into the scheme of things. As you've seen, Maria works as a coordinator for a conference service company, which is in fact basically the same thing as the convention service company on your chart. But as you should also now understand, putting a large conference or convention together normally requires many people putting in a great many hours. This will become clearer as you work your way through the rest of the module.

## ACTIVITY 4

# Site Selection

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Can you imagine going to your high school graduation party and finding that the spot chosen for the event is so small that half the people who've come end up standing around in the parking lot? So much for getting dressed up and wanting to dance.

Whenever a meeting or any other type of event is held, one of the most important decisions is where to hold it. If a poor decision is made here, it's likely that all the planning in the world won't compensate for the problems that will arise. In this activity you'll begin to look at the business of selecting sites for conferences of all sorts.

## Convention Centres

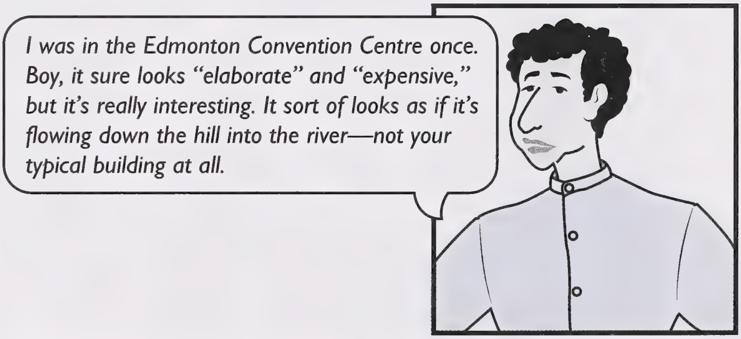
Traditionally, meetings such as conventions, conferences, and international congresses have been held at hotels—or even at several hotels in the same part of the city if necessary. This way delegates and participants can eat, sleep, and work right in the same building or cluster of buildings. Many major hotels have large rooms set up for the sole purpose of accommodating the various sessions that take place at conventions and conferences.

Of course conferences can take place as well in smaller communities lacking any hotels of a size adequate to house events of this sort. When this happens, people attending usually stay in whatever hotels and motels the community has to offer; and other local facilities are booked for the meetings—a local college or school, perhaps.

**convention centre:** *a large facility built to accommodate major conventions and conferences*

**amenities:** *things that provide people with comfort and convenience*

In recent years, however, in most large (and not-so-large) cities, facilities have been built strictly for the purpose of housing conventions. These **convention centres** are often very elaborate, expensive buildings designed to entice as many organizations as possible to hold conventions and conferences within their walls. Because they have to compete with other convention centres in other cities, they try to offer as many **amenities** and attractions as they can to attract clients. Convention centres normally don't have guest rooms as hotels do; they focus instead on accommodating the sessions and exhibitions that take place at most conventions.


*I was in the Edmonton Convention Centre once. Boy, it sure looks "elaborate" and "expensive," but it's really interesting. It sort of looks as if it's flowing down the hill into the river—not your typical building at all.*

To get a better understanding of how convention centres compete for business, turn to page 202 of your text and read the section entitled Canada's Convention Centres to the bottom of page 204. When you're finished, answer the questions that follow.

1. If you were selecting a location for a convention, what factors would you take into consideration when choosing between the convention centres in Montreal, Toronto, and Vancouver? Explain your thoughts clearly.

**Compare your answer with the one in the Appendix, Section 1: Activity 4.**

Remember that by no means all conventions and conferences take place at convention centres. Many—especially smaller ones— are held at hotels or other appropriate facilities. Still, more and more often convention centres are dominating the stage at the upper end of the events-and-conferences business.

## Choosing a Site

Focus Canada

If you look at page 206 of your text, you'll see that the choosing of a location appears right at the top of the chart that outlines the process of planning a convention or conference. Now that you know a little bit about conventic centres, it's time to learn a bit more about this business. Turn to page 205 in your textbook and read the sections entitled Convention Planning Process and Site Selection—as far as the title Trade Shows on page 207. Be sure to survey the chart on page 206 in more detail as you go through this material. Then answer the following questions.

2. Site selection for a conference is very competitive. List **three** incentives that will draw customers to a particular location.

3. What are some disadvantages Canada faces in attracting organizations that are planning conventions?

**Compare your answers with those in the Appendix, Section 1: Activity 4.**

Of course the crucial thing in deciding on a location for a convention or conference is knowing the goals and objectives of the organization holding the conference. Successful planners will always be sure to establish their customers' needs and expectations before even beginning to think of location; that's just common sense. And of course factors such as the number of delegates attending, along with their likely ages and sorts of occupations are all important too.

4. You've been looking for the most part at large convention facilities in major centres, but you may live in a small community. Think for a few minutes of your own town or city or, if you live in the country or a village, think of a town or city close to you.

Task Management

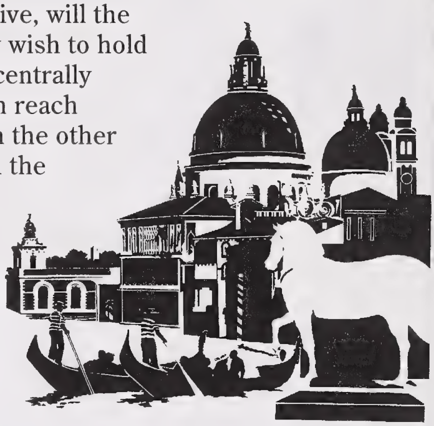
   a. Locate two facilities in your area that sometimes accommodate meetings and conferences; if necessary, ask for help from someone who would likely know.

   b. Suggest the sorts of meetings each facility would likely be able to accommodate.

**Compare your answers with those in the Appendix, Section 1: Activity 4.**

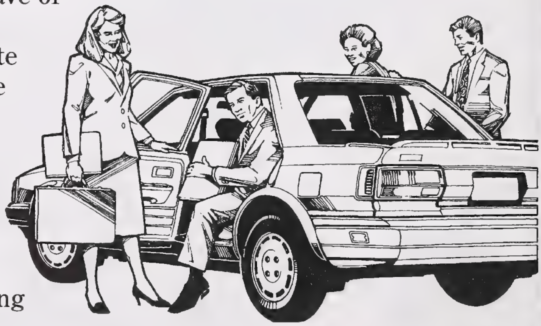
At this point you should have a good general idea of the sorts of things that must be considered when selecting a site for a meeting or convention. Now it's time to look at considerations of this sort more closely. What follows is a more detailed listing of factors that must be taken into account.

When selecting a site for a conference, the following considerations should influence a planner's decision:



- **location:** Where, in the broad perspective, will the meeting be held? The organization may wish to hold the meeting near its head office or in a centrally located spot that everyone attending can reach without undue difficulty or expense. On the other hand, the organization may want to hold the meeting at a resort area—in the Rocky Mountains, for instance—so that the participants can combine business with recreational pursuits. A large organization may decide on a location outside the country. International groups often pick a different country each year. Again, the nature of the organization must be considered; an agricultural group, for instance, might be best served by a conference in a rural area where hands-on field trips are possible.

- **accommodations:** Once the general location has been determined, the planners must check on hotels, convention centres, and/or other facilities in the area. If the convention is being held in a major centre, it's likely that there will be a good choice of facilities; otherwise, it may be necessary to do a bit more digging and creative planning.



- **travel arrangements:** If people are planning to attend a conference from afar, they'll want to know if major airlines have flights to the chosen location, and, if so, what choices they have of scheduled flights. They'll also want to know if there's adequate ground transportation from the airport to the hotel or convention centre. If people will be attending from outside the country, planners must supply them with any relevant laws and regulations of the country they'll be entering as well as information on the customs and habits of people living there. Even if the conference is a smaller affair, planners must ensure that taxis, buses, and so on are adequate for the job they'll be asked to do.

- **leisure/entertainment:** Planners must always make sure that the hotel or conference centre, as well as the general location chosen for the event, meet the expectations of their clients—the organizations for whom they're planning the conferences. Most people attending conventions and conferences these days expect some recreational facilities. Planners must know if there are such things as fitness centres, swimming pools, and golf courses available. Perhaps the client organization would like a beach or a nearby ski hill—or some other recreational facility. Once the location and a tentative meeting site have been selected, it's wise for the meeting planners to make a good first-hand inspection of the building and area before making a final commitment.

- **other factors:** As well as the preceding four considerations, there are other factors to be considered in establishing a location for a conference. Here are some questions a planner must ask:

  - What type of security systems and procedures does the facility have? Guest-room protection is essential, but what about security for expensive electronic equipment and customer products that will be left in the meeting rooms at the end of the day? This is an important matter that must be discussed with the site manager.

  - Does the facility have an adequate number of rooms—and rooms of an adequate size—to accommodate the meetings that will take place?

  - Are there enough hotel rooms to accommodate all of the quests?

  - Are features like dining rooms, coffee shops, and room service available?

  - Does the facility supply the equipment needed for meetings—things like public-address systems, VCRs, overhead projectors, slide projectors, and computers?

  - Does the facility have an adequate air-conditioning system?

  - Will the hotel provide banquet facilities during the conference? If so, how will things be arranged?

  - Does the facility have its own meeting planners on staff to assist in the planning process?

Deciding on a conference site isn't a simple matter. Of course with smaller, more local meetings things aren't as complex as with large conventions; nevertheless, care must be taken to find the right spot and the right facility.

5. A small conference is planned for the senior sales staff of a Canadian retail toy company. A new product line is being introduced, and the principal reason for the conference is to introduce it to the senior sales people and to provide new marketing techniques to promote the toy line. Because of the sort of information to be presented, some of the sessions at the conference will involve demonstrations of the new product.

   The conference will be held in Toronto, the location of the company's head office. It will last three days. About a hundred people will be attending from across the country. You have been hired to help plan the conference.

   a. Prepare a brief plan of accommodation—in other words, a description of what you will be looking for in a hotel or convention centre (or some other sort of facility) to meet the needs of this particular conference.

   b. Finally, think of your own community—or a larger centre near you. Focus on a hotel, convention centre, or some other facility at which conferences can be held. Evaluate its suitability to accommodate the sort of convention being discussed. Write up your evaluation in a brief report; be sure to include a list of both the advantages and disadvantages of the facility.

Teamwork

If you have a study partner, exchange your answers to these questions and discuss them. See what you can learn from each other's ideas.

**Compare your answers with those in the Appendix, Section 1: Activity 4.**

You've now made a good start at becoming a conference planner; you have an idea of how to go about selecting a location and a facility for a meeting. As well, you've learned that identifying the needs and expectations of your clients, organizing the details of location and site, and designing a plan to include the specific requirements of the people attending a conference are all important items in ensuring customer satisfaction.

# FOLLOW-UP ACTIVITIES

If you had difficulty understanding the concepts in the activities, do the Extra Help. If you have a clear understanding of the concepts, do the Enrichment.

## Extra Help

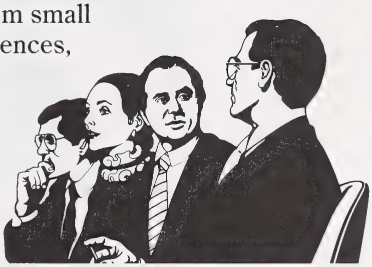
The business of arranging meetings like conventions and conferences falls into the sector of the tourism industry generally known as the events-and-conferences sector. This is a fast-growing part of the tourism industry and one directly related to many other sectors. Conferences, conventions, and other types of meetings have become one of the chief lubricants that keep the wheels of the business world turning, benefiting the organizations involved, those who provide the services, and, indirectly, many other people and business as well.

1. In a paragraph discuss some of the principal benefits provided by the holding of conferences. In composing your answer think of as many organizations and businesses as possible that enjoy these benefits.

2. Imagine that a provincial seed-growers' conference is planned for mid-July in your own town. List **five** specific community businesses that would benefit from the conference. In each case, give reasons.

**Compare your answers with those in the Appendix, Section 1: Extra Help.**

Meetings come in a variety of shapes and sizes, from small seminars and workshops up to conventions, conferences, and congresses involving thousands of people. In fact, large meetings such as conventions are usually set up so that several smaller types of meetings, such as seminars and workshops, take place within them.



3. Read the passages that follow; then identify the type of meeting that best fits each situation.

   a. Four internationally famous experts on the question of the depletion of the ozone layer have been asked by the University of Alberta to speak on and debate various aspects of the problem. The meeting will be open to the general public.

   b. Producers and distributors of educational videotapes and CD-ROMs hold a four-day meeting where their products are on display for potential buyers—chiefly schools and other educational institutions.

c. Optometrists from across Alberta get together every spring somewhere in the province for three days of lectures, displays, workshops, and socializing.

d. Dentists across the country gather in small groups to learn about and discuss the latest developments in the controversy over the safety of mercury-amalgam fillings.

e. A number of would-be fiction writers gathers to learn and practise techniques of creating believable dialogue. All participants are expected to take part.

**Compare your answers with those in the Appendix, Section 1: Extra Help.**

No matter what type of meeting is to be planned, one of the very first jobs of the planner is to decide on a general location and a particular facility—a hotel, convention centre, or some other building or group of buildings. In making this decision the planner must bear many things in mind, among them

- the objective and expectations of the group having the conference
- the number of participants who will be attending
- the sorts of people likely to attend—age, interests, professions, and so on
- the attractions of the cities or areas being considered
- the amenities available at the facilities being considered
- cost
- travel facilities available to and from the location and within the general area
- security at the hotel or convention centre

4. Imagine that a group of two or three hundred senior citizens is planning to hold a three-day conference somewhere in Alberta to discuss and learn about problems faced by the elderly in our society today. Describe just what you'd look for in a location and facility if you were determining where this conference would take place.

**Compare your answer with the one in the Appendix, Section 1: Extra Help.**

## Enrichment

Do **one** or **both** of the following.

Task Management

1. Locate a site in your city, town, or area that's sometimes used for conventions or other types of meetings. For instance, you may find a convention centre, a hotel, a community centre, a school, or some other facility that will serve the purpose.

   Find the person in charge of the facility—or in charge of its function as a site for meetings—and introduce yourself, indicating that you're taking this course and explaining your interest in planning meetings and conventions. Ask if it would be possible for this person to grant you an interview to discuss the process of planning and organizing a conference.

   If you're lucky enough to arrange an interview, be sure to come well prepared with questions. The following list should provide you with ideas.

   - Does this facility conduct meetings often?
   - How many meetings and social events are conducted annually?
   - What types of meeting rooms do you have? Are the rooms large enough to accommodate any size and type of meeting?

   - Does the site have the necessary equipment for meetings and events (audiovisual equipment, speaker podiums, and so on)?
   - Does the facility have guest rooms and/or suites? How many? Are there on-site restaurants?
   - What type of on-site security do you have?
   - How do you attract business to this site?
   - What marketing and sales strategies do you use to accomplish this? Brochures? Newspaper? TV? Radio?

- What other local businesses directly benefit from the meetings? Restaurants? Food-and-beverage businesses that supplies the facility? entertainment businesses? Magazine stores? Retail outlets?

- Does your site attract out-of-town customers as well as local ones?

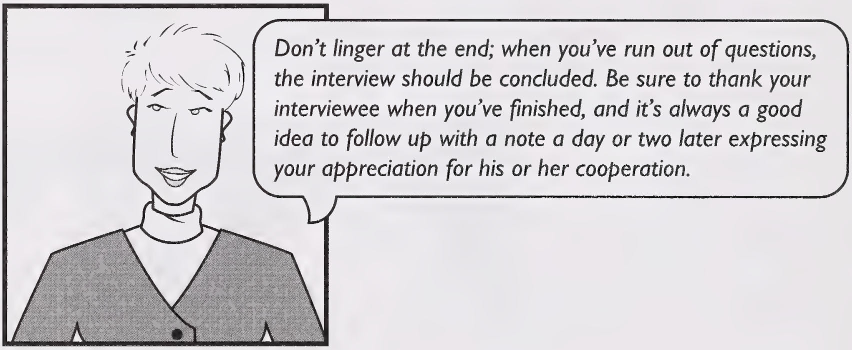
- Are the costs to host a meeting at your site competitive with those of other meeting sites?

- What advantages does you facility have to offer? Location? Recreation? Safety?

Communication

When you've finished your interview, write up your findings in a report. In your report, include your own evaluation of the facility. If possible, share your report with a learning partner.

Remember when you conduct an interview to be polite and considerate; after all, your interviewee is taking time out from his or her schedule to accommodate you. Always come well prepared, and be sure the interview moves along briskly and quickly. If you wish to use a tape recorder, be sure to ask permission.


Don't linger at the end; when you've run out of questions, the interview should be concluded. Be sure to thank your interviewee when you've finished, and it's always a good idea to follow up with a note a day or two later expressing your appreciation for his or her cooperation.

For more tips on interviewing, look ahead to Section 3: Activity 1.

Technology

2. If you have access to a computer connected with the Internet, set up a search for "convention centres." You should find descriptions of facilities from all over the world; you'll likely be amazed at how opulent many of them are. Ask yourself which ones you'd like to go to most if you were heading to a conference somewhere outside the country.

**Compare your answers with those in the Appendix, Section 1: Enrichment.**

# CONCLUSION

The events-and-conferences sector of the tourism industry is an active and growing one, providing facilities and services to a wide variety of businesses and organizations as they plan, organize, and hold meetings of all sorts. All this activity generates wealth not only in the events-and-conferences sector but throughout the tourism industry and within the communities in which conferences are held.

Being a planner of conventions and conferences is a complex, challenging, and rewarding task. In this section you've seen that the job of a planner begins with finding the right location and facility for a conference. In the next section you'll dig more deeply into the job of planning and holding conferences and conventions.

**ASSIGNMENT**

Turn to your Assignment Booklet and do the assignment for Section 1.

SECTION 2

# Planning Meetings and Conferences

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HAVE you ever been involved in the planning and staging of a real meeting or any other organized event involving a number of people and several activities? If you have, you'll already have some idea as to the complexities involved in organizing even simple events. Now multiply those complexities hundreds of times, and you'll appreciate why planning meetings can be so challenging.

When you've worked your way through this section, you should be able to develop a basic meeting plan, select the resources you'll need, develop an agenda, marketing scheme, organizers' plan, and budget, and come up with criteria for evaluating the success of the meeting.

Remember that your assignment for this section will involve helping plan, carry out, and evaluate an actual meeting or event. If you haven't yet done so, turn to your Assignment Booklet now and read through the entire Section 2 assignment so you'll be able to make the necessary arrangements. If you wish, you can certainly contribute to the meeting or event you'll be involved with as you work through this section.

## ACTIVITY 1

# Developing a General Meeting Plan

## The Importance of a Meeting Plan

You've probably attended a few meetings in your life that were obviously just badly planned—perhaps a gathering of a school club or a church organization—or perhaps just a family get-together. If so, you'll know the frustration people feel when they take the trouble to attend and leave feeling that everything went wrong and that nothing was accomplished.

The simple truth is that if a meeting of any type is to be successful, it must be well thought out in advance. Many things must be taken into account in planning a meeting, and one of the most important is the needs and expectations of the group or organization having the event. The success of a conference can depend to a large extent on a planner's ability and care in communicating with a client—the group having the meeting.

Frequently in this activity—and throughout Section 2—you'll be assuming the role of a meeting planner. As you work through the material, remember that careful planning should combine the interests of the participants with your own ideas to develop a successful meeting that involves both the participants and you, the planner, and leaves you with a feeling of accomplishment and satisfaction in knowing that the event was worth all the effort.

Whether you're organizing a meeting that's large—say a two-week international congress on environmental concerns—or small—like a one-day family reunion—planning is the key to success. And to plan any meeting, certain steps are required, though naturally they'll have to be modified slightly to suit each occasion. The first step is usually to develop a general, or initial, **meeting plan**.

**neeting plan:** *a plan drawn up it the start of the process of organizing a meeting to provide a general overview of the project*

A meeting plan is simply a general plan that's drawn up in the initial stages of organizing a meeting. It lays out the basic factors that planners must know as they set about their business. The discussion that follows will run through the most important of those factors.

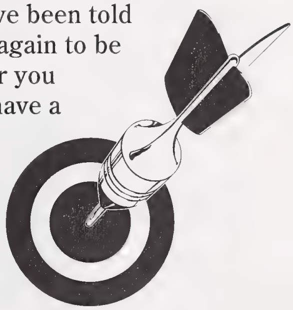
## The Elements of a Meeting Plan

A properly drawn-up initial meeting plan should take into account at least the following eight factors.

- **The purpose of the meeting:** Clearly a planner and the group having the meeting (the client or client group) must carefully discuss the goals and objectives of the planned meeting. The planner must keep an open mind throughout this discussion to ensure that he or she knows exactly what the goals and expectations of the group are.

- **The subject or theme of the meeting:** Closely related to the purpose of a meeting is its subject or theme; but the two shouldn't be confused. For example, suppose you were part of a group having a meeting to raise money for an expensive new time clock in your school gym. The purpose of the meeting would be to encourage people to donate money, but your subject might be the importance of sports within your community. Similarly, on a larger scale, doctors might hold a convention each year for the same general purposes, but each convention could have a different theme or focus—for instance dealing with shrinking health-care funding or looking at the rise of alternative types of medicine.

- **The target group:** If you're like most students, you've been told by English and language arts teachers over and over again to be aware of just who your intended audience is whenever you write anything. So too, every meeting planner must have a very clear idea of just what sort of people will be attending a meeting. It would be bad form for instance, to organize a casino night for a gathering of people recovering from a gambling addiction. And a lot of sweet, rich food wouldn't go over well at a diabetics' conference.



- **The scope of the event:** Something else a planner must know is just how exclusive—or wide open—the planned event will be? Will it be a relatively small, private affair, closed to the public? Will it be by invitation only? Or, by contrast, can anyone attend? Will participants be local people, or will delegates be arriving from across the province or country—or even from foreign countries?

- **The official name and the date for the event:** This one probably seems obvious, but at the initial planning stages it's something that has to be nailed down. It's surprising how sometimes it's the simple things that everyone tends to overlook.

- **The organizing group or leader:** Most groups that intend to have a meeting will elect someone to be in charge of organizing it, and for larger conferences and conventions there will generally be a committee to look afte this sort of thing. Anyone involved in planning must know just who's involved in organizing—who can make decisions and give approval to the planner's ideas.

- **The number of participants:** Again this one seems obvious, but it's vitally important to know as soon as possible how many people are likely to attend the event being planned. Even the most basic planning—involving such things as choice of facility and arrangements with food-and-beverage suppliers—can't be made if planners don't have some ideas about the numbe of participants expected.

- **Group responsibilities:** Finally, a planner must know just what groups within the client organization are responsible for what. If this hasn't yet been entirely worked out, it should be organized at this point. Especially in the case of a large conference, there's so much to do that many separate committees are often needed to take charge of different tasks, and a planner must be able to work with all of them.

1. Experienced planners often use a data-gathering form to create their meeting plans. These will vary from planner to planner, but most are designed to organize information of the sort you've just been studying.

   In your workbook, create your own meeting-plan form listing the eight factors you've looked at, along with any others you think would be important for a planner to consider. Be sure to leave room beside each factor to fill in necessary information as you gather it. The form has been begun for you, though you needn't follow this format if you have another idea.

## THE MEETING PLAN

**Client's Name:** ______________________________

**Purpose of the Meeting:** ______________________________

______________________________

**Compare your form with the one in the Appendix, Section 2: Activity 1.**

2. Following is a brief description of a meeting that you, a professional meeting planner, have been asked to help plan. Read it through; then use your Meeting Plan form to create a meeting plan. Feel free to adapt your form as necessary; the suggested answer for question 1 may help with this.

   You've been contacted by a Ms. Desirée Halvorsen to help plan this year's annual convention for her company, Bradford Real Estate. This company, which specializes in selling private residences throughout Western Canada, likes to bring its employees together each year in a different location—preferably a scenic one—so they can relax, have some fun, and share ideas, but also so that they can improve their selling techniques. This year the focus will be on marketing real estate in our changing economy. The convention is open to all employees of Bradford Real Estate, along with their spouses or partners; it's expected that there will be about five hundred people attending. The convention will last three days—April 12 to 14—and is to be called simply Bradford's Annual Convention. The Bradford employee who'll be in charge of organizing the event is Mr. Claude O'Brien, and he's been instructed to set up separate committees to deal with accommodation, food-and-beverage requirements, and the arrangement of sessions.

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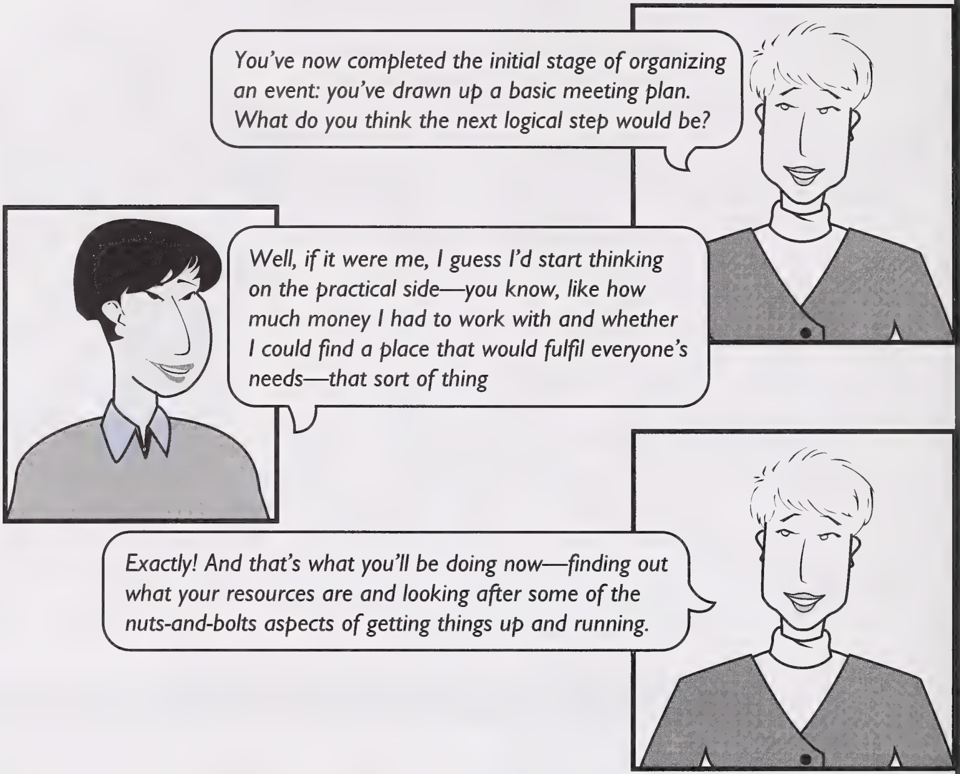
**Compare your form with the one in the Appendix, Section 2: Activity 1.**

Having a clearly laid out meeting plan gives you a head start in planning a meeting of any size. Knowing such things as your client's objectives and the size of the meeting planned are clearly vital in organizing a successful meeting. There is, however, much more involved in the planning process; the next activity will take you to the next stage.

## ACTIVITY 2

# Working with Your Resources


You've now completed the initial stage of organizing an event: you've drawn up a basic meeting plan. What do you think the next logical step would be?
Well, if it were me, I guess I'd start thinking on the practical side—you know, like how much money I had to work with and whether I could find a place that would fulfil everyone's needs—that sort of thing
Exactly! And that's what you'll be doing now—finding out what your resources are and looking after some of the nuts-and-bolts aspects of getting things up and running.

## Resources to Take into Consideration

**resources:** *available assets; things one can use to put a plan into effect*

**budget:** *the amount of money available for specific purpose or a plan for the balancing of revenue (or income) and expenses*

What follows is another list—this time a list of some of the things a meeting planner has to think of at this stage of the planning process. These things can all be called **resources** because for the most part they're the things a planner has to work with in putting together a meeting or conference. It's very important to list and evaluate the resources that are available and then select the ones that best seem to suit the objectives of the group holding the meeting.

- **the proposed budget:** Before going ahead and making any plans, a meeting planner has to know what his or her client's **budget** is. Obviously if an event is planned that goes well beyond the amount the organization has to spend, there's going to be a serious problem.

Often a group planning to hold a meeting allocates so much money to the project right at the start, and planners have to stay within its limitations. But of course conferences can bring in money too; delegates may have to pay registration costs, and sometimes exhibitors will pay for a booth to display their products. And sometimes there will be **sponsors** contributing funds—often in return for the right to advertise. In working out a budget, **revenue** of this sort must be balanced against expenses. Here's a simplified example:

**sponsors:** *people or groups that contribute money or goods—often in return for the right to advertise their own products or services*

**revenue:** *income; money brought in*

| REVENUE | EXPENSES |
|---|---|
| • registration fees<br>• money from sponsors<br>• grants<br>• money from exhibitors | • advertising<br>• facility rental<br>• entertainment<br>• salaries<br>• food-and-beverage expenses |

You'll be examining budgets in more detail in Activity 6.

- **the facility:** This is something you dealt with in some detail in Section 1, so there's no need to add much more here. The site and facility of an event are very important to the success of the event, and must be carefully considered at this point.

- **transporation:** Every planner must consider the transporation resources available for the meeting. If the conference is a big one that attracts people from far away, will there be adequate plane connections? What about shuttle services to and from the airport? Will delegates have access to enough taxis? And even for smaller events, planners must ensure that the process of getting to it isn't too difficult. They should look at things like nearby parking facilities and the distances people will be asked to travel.

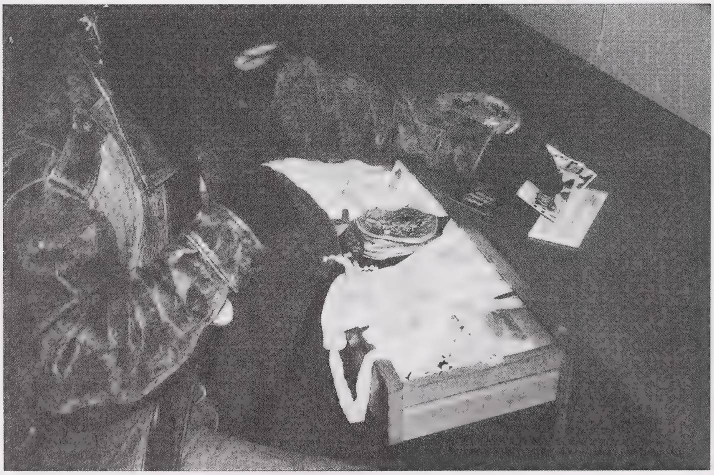
- **accommodation:** Often the facility in which the conference is being held will also offer accommodation to participants, but not always. Convention centres, for instance may not, and certainly smaller events held in buildings like community centres and schools will need accommodation facilities nearby if people will be staying overnight. And even when an event takes place right in a hotel, often some people may prefer to stay in cheaper accommodation nearby—a small motel, perhaps. Planners must bear these things in mind when picking a location.

- **food service:** People attending any kind of event have to eat, and one of the best ways of ensuring a lot of upset participants is to have made inadequate food-and beverage arrangements. Planners, once they know how many people to expect, must be sure there will be good food available when and where people want it, or that there are acceptable restaurants nearby that can supply it. Delegates to many meetings also expect things like snacks, coffee, and water available when they're attending sessions and socializing during breaks.

- **entertainment:** Many events include entertainment of various sorts to give participants a chance to relax and enjoy themselves. Larger conferences sometimes have dances, wine-and-cheese parties—perhaps complete with a musician or two in the background—mini-golf tournaments, or other types of entertainment arranged for delegates' pleasure. And smaller, informal events can centre around activities that provide fun and recreation for all—such as softball or horseshoes at a company picnic.

- **companion activities:** Many delegates at conferences and conventions bring their spouses or partners along for a short holiday; but sometimes while the actual seminars, workshops, and other sessions are going on, these companions can be left with little to do. A well-planned event will often have at least some activities lined up during the day specifically for delegates' companions; then, in the evening social events can take over involving both delegates and their partners.

- **safety and security of the participants:** Finally. it's important for a planner to see to it that adequate measures and precautions are in place to ensure the safety and security of participants in a conference. The security systems of whatever facilities are being considered should be investigated, and whatever measures seem appropriate put in place for the planned event. Large conventions especially can be a field day for thieves—all those people in town with money to spend, and their rooms deserted most of the day while they're involved in conference activities!



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Of course each event being planned will likely have its own special requirements that should be dealt with at this stage; but the preceding list should give you a good start in sizing up the resources you'll need—and the ones you know you have at your disposal—when planning an event.

1. Participants in a conference need transporation to and from the meeting site.
    a. Make a list of the possible transporation needs of participants at an international congress.
    b. Explain the factors a planner would need to consider when making transporation arrangements and decisions.
2. Food service and entertainment are two aspects a planner must consider in organizing a conference. Suggest **two** decisions that must be made when making arrangements in these areas if participants are to be satisfied and expenses are to be kept within the budgeted amounts.
3. Imagine you're in charge of arranging the main meal for a day-long dog-trainers' conference. It's been decided that the meal will be supplied by a local caterer, and people would like some sort of entertainment during the meal—music, probably. Think of all the decisions you'd have to make and steps you'd have to go through to make sure the meal was properly planned. Then create a form or checklist of your own design that you could use to help you get the job done properly. You could begin it like this:

**ARRANGING THE FOOD**

**Caterer:** ______________________________

**Compare your answers with those in the Appendix, Section 2: Activity 2.**

Taking note of, and evaluating, the resources you'll need to put together the meeting you've undertaken to organize is obviously a necessary step in the planning process. What usually comes next is developing an agenda or program. That's what you'll be doing in the next activity.

## ACTIVITY 3

# Developing an Agenda

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**agenda:** *a plan of things to be done*

If you've attended many meetings, even very informal ones, in which no one seems to have any idea of what should be done—and when—you should have a good appreciation of how important it is for a planner to come up when an **agenda** or program for any event. From your experiences with small get-togethers, just imagine how much confusion there'd be at a conference involving thousands of participants, many dozens of sessions and activities, and possibly even several different facilities if no one had bothered to hammer out a precise agenda.

Basically, what a planner has to do to work out an agenda is take all the sessions and other activities that the client group have said they want and organize them in a logical way into the time-frame allotted. This can be quite a simple matter for a small meeting and a major headache for a larger one.

When working out any agenda—for a large meeting or a small one—there are really just a few basic factors to be taken into account. They are

- the sessions that will take place—workshops, general addresses, and so on
- any entertainment and social occasions that have been decided on
- coffee breaks and refreshments
- meals

Here's a page taken from Alberta Agriculture's document *A Working Guide to Planning an Event*, a document you were introduced to in the Suggested Answers for Activity 2. This page was designed to help plan a simple agenda for a one-day conference. Look it over and then answer the questions that follow it.

## PLANNING A PROGRAM

Date: ____________________

| | | | | |
|---|---|---|---|---|
| 9:00 a.m. – 9:30 a.m. | REGISTRATION | | | |
| 9:30 a.m. – 10:00 a.m. | OPENING ADDRESS<br>Chairperson: | | | |
| 10:15 a.m. – 10:30 a.m. | REFRESHMENTS | | | |
| 10:30 a.m. – 12:00 noon | SELECT-A-SESSION | | | |
| | | | | |
| 12:00 noon – 1:00 p.m. | LUNCH | | | |
| 1:00 p.m. – 3:00 p.m. | SELECT-A-SESSION | | | |
| | | | | |
| 3:00 p.m. – 3:15 p.m. | REFRESHMENTS | | | |
| 3:15 p.m. – 4:00 p.m. | GROUP SESSION/KEYNOTE SPEAKER<br>Speaker: | | | |
| 4:00 p.m. – 4:30 p.m. | CLOSING ADDRESS<br>Speaker: | | | |

[1]

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[1] *A Working Guide to Planning an Event* (Edmonton: Alberta Agriculture, Food and Rural Development, 1989), 7. Reprinted by permission.

1. On this agenda, fairly large blocks of time are scheduled in both the morning and afternoon of the conference under the heading “Select-a-Session.” What would these be for?

2. Note that an hour has been left for lunch. Suggest a situation in which this might not allow enough time.

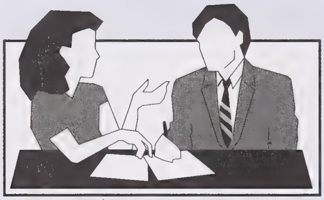
3. At 3:15 P.M. a group session has been scheduled with a “keynote speaker.” What would a “keynote speaker” likely be?

**Compare your answers with those in the Appendix, Section 2: Activity 3.**

People attending conferences are usually presented with an agenda nicely written up on a piece of paper (sometimes called a **program sheet**) or—in the case of a larger conference—in a booklet (often called a **program book**). Here’s an example of what you might find for a relatively simple, day-long conference:

**program sheet:** *a one-page document, given to meeting delegates, that outlines the program*

**program book:** *a multi-paged document, given to meeting delegates, that outlines the program*



## Chartered Accountants of Alberta Annual Symposium

### Topics

- *Government designs new tax breaks!*
- *New software packages for accountants*
- *Tax evasion—new concerns for clients*
- *Capital gains exemption—Is it gone forever?*

### Speakers

- *Ms. I.M. Allforitt*
- *Mr. Hi de Funds*

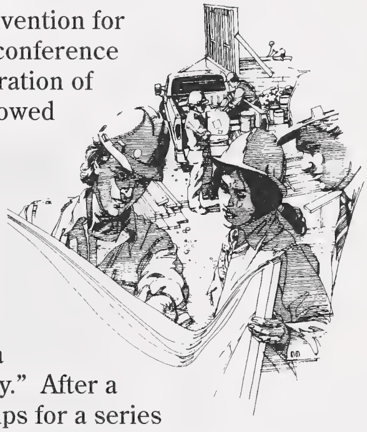
| | |
|---|---|
| 8:00 – 9:00 | Breakfast—in banquet hall |
| 9:00 – 10:00 | **Session 1:** Government designs new tax breaks! |
| 10:00 – 10:15 | Coffee break; refreshments served |
| 10:15 – 11:30 | **Session 2:** New software packages for accountants |
| 11:30 – 1:00 | Lunch—in banquet hall |
| 1:00 – 2:30 | **Session 3:** Tax evasion—new concerns for clients |
| 2:30 – 2:45 | Coffee break; refreshments served |
| 2:45 – 4:00 | **Session 4:** Capital gains exemption—Is it gone forever? |
| 4:00 – 5:30 | Reception—cocktails and hors d’oeuvres |

Note that this sheet not only contains the basic information participants in the conference would need, but also presents this information in an attractive, easy-to-read format. It invites particpants into the conference without intimidating or overwhelming them.

Technology

4. Here's a description of a conference. Design your own program sheet to convey the necessary information to participants. Try to create an attractive page, but don't just copy the example you've been given; get those creative juices flowing! If you have access to a computer, by all means use it.

   As it has done each year for the past nine years, the ABC Construction company is holding a day-long convention for everyone who works for the organization. The conference will be held on May 1, beginning with the registration of participants at 8:15 A.M. Registration will be followed at 9:00 by the first session, which will last all morning, except for a fifteen-minute coffee break. The topic of this session is "Building Materials for the Twenty-First Century," and the speaker is Mr. Ian MacPherson. The second session is scheduled to begin at 1:00, right after lunch, and will run for an hour and a half. It will consist of a talk given by Ms. Alanna Aboud on the topic "Safety Is Everyone's Priority." After a short break, participants will meet in small groups for a series of workshops, ending at 4:00 P.M. The conference will close with a reception and dinner beginning at 5:00 and ending at 7:00.



**Compare your program with the one in the Appendix, Section 2: Activity 3.**

Of course a conference lasting only one day requires a relatively simple agenda—one that can often be effectively presented on a single sheet of paper. But imagine the complexities involved in working out an agenda for a large conference lasting perhaps a week or two and possibly taking place in several buildings. Imagine, also, the problem of designing a program booklet that would give participants to such a conference the information they'd need to have to be able to navigate through the conference, attending the sessions they wanted to attend and seeing the displays they wanted to see.

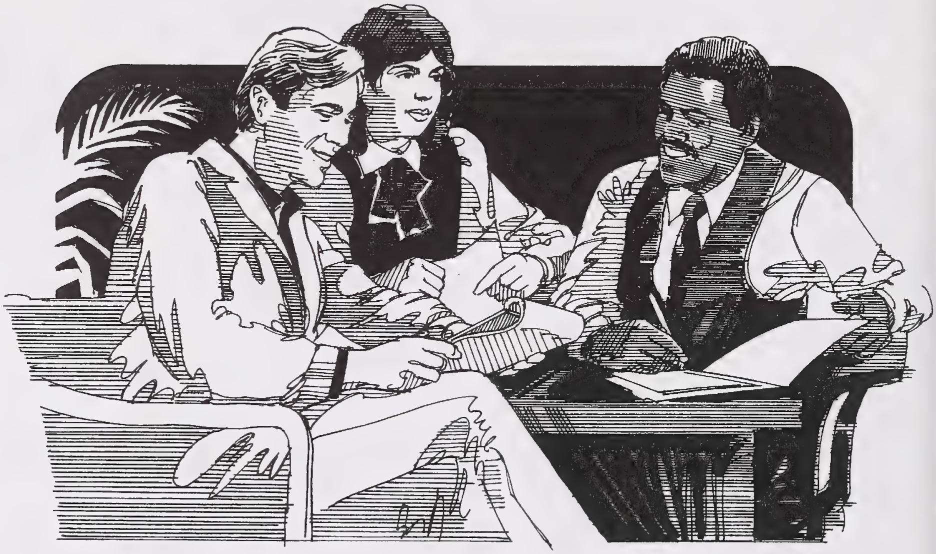
5. You've got the job of designing a program booklet to be sent out to people who will be attending a week-long conference. The conference will have sessions and displays at three hotels in the downtown area of a large city. Many participants will be unfamiliar with the hotels, the city, and the format that's been designed for the conference. What information will you include in your pamphlet to ensure that the participants have the help they'll need to have a positive experience at the conference?

**Compare your answer with the one in the Appendix, Section 2: Activity 3.**

Knowing how to develop an agenda for a meeting or conference and present it in a clear, organized, and "user-friendly" manner are important skills for a planner to have. Another important skill is being able to develop a marketing plan for a meeting. It's this ability you'll focus on in the next activity.

## ACTIVITY 4

# Developing a Marketing Plan



### Marketing and the Marketing Plan

Imagine that a trade show on the latest computer systems is coming to your community but the planners have forgotten to advertise the event. The results will likely be catastrophic. A great deal of money will be spent, but very few people will show up. The companies displaying their products will just be wasting their time and money, and people and businesses in the community that might have benefitted by learning about new systems that they could use will have missed out on an important opportunity.

**market:** *sell, promote, and advertise a product or service; bring buyers and sellers together*

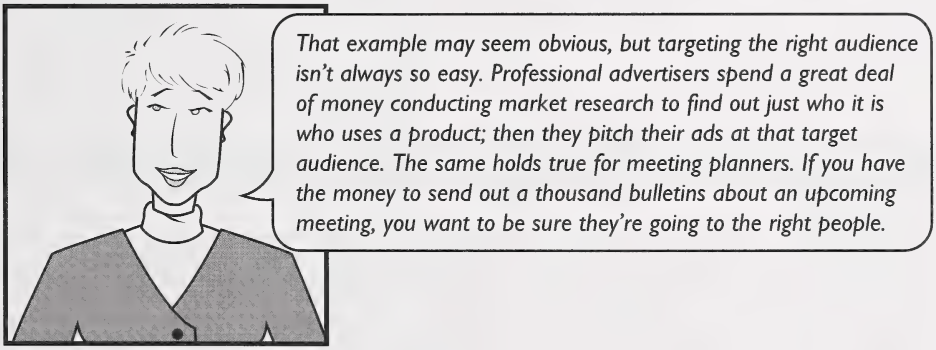
**marketing plan:** *a systematically developed strategy for promoting or selling a product or service*

Any meeting, whether it's a small-scale school or community gathering or an international congress, must be **marketed** if it's to be a success, and it thus becomes a key responsibility of those planning the meeting to develop a **marketing plan**.

A marketing plan is simply a well-thought plan of how you're going to inform the public that your meeting will be taking place and what you're going to do to entice people to attend. Advertising on television and radio, putting up posters and public notices, and mailing out flyers are all common ways of advertising the fact that an event will be taking place. Methods of enticing people to attend the event might include things like having draws and door prizes, including recreational activities and/or meals in the price of admission, and holding contests in which you give away free tickets, though the best way to assure a good turnout should always be to put on a quality event and inform people that it will be taking place.

## Knowing Your Target Audience

The very first thing planners must do in developing a marketing plan is to find out exactly what sort of people the planned meeting or conference is designed for. It would probably be quite a waste of time, energy, and money, for example, to put up posters advertising an information session on parenting in a home for senior citizens; clearly the target audience for a meeting of this sort should be chiefly young adults.


That example may seem obvious, but targeting the right audience isn't always so easy. Professional advertisers spend a great deal of money conducting market research to find out just who it is who uses a product; then they pitch their ads at that target audience. The same holds true for meeting planners. If you have the money to send out a thousand bulletins about an upcoming meeting, you want to be sure they're going to the right people.

1. Suggest a likely target audience for each of the following meetings:

   a. an information session on retirement planning

   b. a workshop on the Heimlich manoeuver (a technique for helping people who are choking on food)

   c. a seminar on cooking nutritious meals for less money

   d. a symposium on the moral theory of the philosopher Immanuel Kant

   e. a talk on the dinosaurs of Alberta

   f. a conference on survival skills in the bush

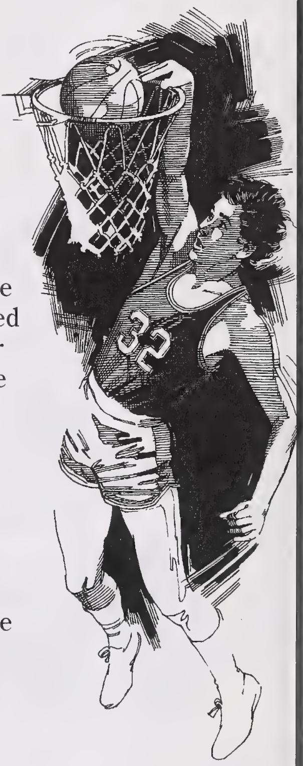
**Compare your answers with those in the Appendix, Section 2: Activity 4.**

## Advertising and Promotion

Once you know just who your target audience is, your next job as a planner is to advertise the meeting. You've already looked at a few common methods of advertising meetings and events, but of course there are many other methods available to raise people's awareness of an upcoming meeting or event and to arouse their interest in it.

2. Your school gym is desperately in need of repairs and upgrading. In fact, all the athletic equipment in the school is old and out of date. However, due to financial restraints, there just isn't any money in the school's budget to bring things up to an acceptable standard.

   As a concerned, sports-minded student, you've joined a group whose goal is to raise funds to renovate the gym and buy new equipment. Your first step is to have a meeting of students, teachers, parents, and interested members of the community to come up with a plan for raising funds. You've selected a time and place for the meeting, and now you have to advertise it.



Teamwork

Communication

Technology

   a. Suggest methods of advertising the meeting that would arouse public interest in the project. If you have a study partner, brainstorm ideas.

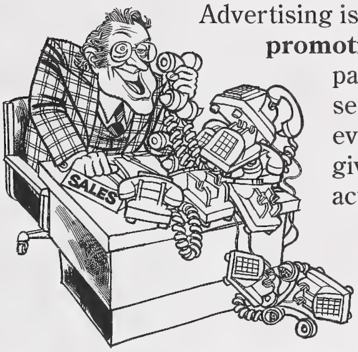
   b. One method you've decided to use is to put up posters around town. Create a poster that does the following:

      - catches people's attention
      - tells them what the meeting is about
      - arouses their interest in the problem
      - gives them the information they'll need to know if they wish to attend
      - does all this in an attractive layout that doesn't appear cluttered

      Use a computer to develop your poster if you wish.

**Compare your answers with those in the Appendix, Section 2: Activity 4.**

**promotion:** *encouraging people to buy a product or service or to do something or behave in a particular way*



Advertising is really just a part of the larger business of **promotion**—the business of encouraging people to participate in something or to buy a product or service. There are all sorts of ways to promote an event—anything from having draws and prizes to giving away free tickets to including recreational activities as part of an event.

Another part of the business of promotion can involve lining up community sponsors to help cover the costs of an event. Local businesses will often contribute products or money to a worthy cause—sometimes in return for permission to advertise at the meeting or event, and sometimes simply for the good will (and potential future business) this kind of community support can create.

Innovation

Teamwork

3. Imagine that you've held your meeting designed to generate ideas for raising money for renovating the school gym. One of the ideas that came out of the meeting was to hold a fun fair in the gym one Saturday. You're in charge of promoting this event. Suggest some of the methods you'd use to make this event a success and to encourage as many people as possible from the community to show up and spend their money. Again, brainstorm ideas with your study partner if you have one.

**Compare your answer with the one in the Appendix, Section 2: Activity 4.**

## Registration Materials

You saw in the preceding activity that it's important to have a clearly presented program to give to participants at a meeting to tell them what's going on when and where. This is usually sufficient for relatively small meetings; but people attending larger meetings—for example, conferences that last several days—usually require more than a program of this sort. In fact, when they arrive and register for the event, they're usually given whole packages containing a variety of things they'll need during their stay. Sometimes some of these materials are mailed to them in advance so participants can familiarize themselves with the conference and its location.

Because packages like these are given to participants before a conference begins, creating them can be considered as part of the marketing aspect of organizing a meeting. An attractive package containing the materials participants need but not enough to overwhelm or intimidate them can be an important element in promoting a conference.

4. Imagine you're going to a three-day conference in a city you don't know very well. You'll be driving to the conference, and you expect to eat at nearby restaurants. You've received a package of pre-registration information in the mail. What information would you like to find in your package that would help make your experience at the conference a positive one?

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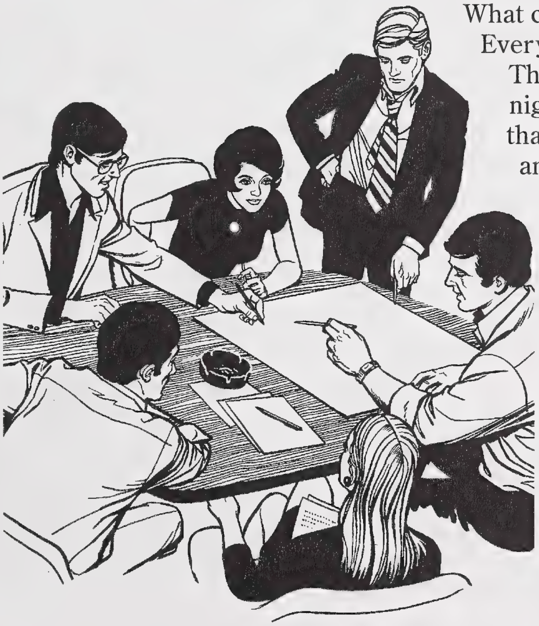
**Compare your answer with the one in the Appendix, Section 2: Activity 4.**

Coming up with an effective marketing plan is a fundamental job for anyone organizing a meeting or some other event. The best laid-out, smoothest-running meeting in the world will be a total waste of time if people just don't know it's taking place or if the advertising fails to arouse their interest.

## ACTIVITY 5

# The Organizers' Meeting Plan

A conference is to take place and you're the chief planner. The site has been arranged, the meeting halls and guest rooms should meet your client's expectations. You've just negotiated the cost of food-and-beverage services with the hotel banquet manager. The plans are confirmed. Satisfied with yourself for having taken care of all the details, you get busy with other projects, when … the phone rings and you find yourself listening to a very angry voice at the other end. It's someone from the conference committee of your client organization, and she's furious because there's no coffee in the urns outside the meeting halls, lunch wasn't served until 12:30 even though it was scheduled for noon, and none of the rooms in which talks are being given have the audiovisual equipment the speakers need.



What could have gone wrong? Everything should have run smoothly. This is a conference planner's nightmare, and you know full well that it's you who is going to have to answer for the mix-ups. As you think more about it, and make a few frantic phone calls, it begins to become clear what the problem is. In concentrating on the participants of the conference and thinking of their needs, you forgot all about the needs of the hotel staff and other people involved in organizing, supplying, and staging the conference.

Everyone involved in the business of holding a conference—from top planners to table busers—needs specific, precise, and correct meeting plans if the conference is to run smoothly. If you haven't arranged with anyone at the hotel that the coffee urns are to be kept full, or if you forgot to notify the food-and-beverage people about that change in the time scheduled for lunch, these things won't be magically looked after.

Part of a planner's job is to see to it that all the people performing the functions on which the smooth running of a conference depends know just what they have to do and when they have to do it. That doesn't mean, of course, that a planner must speak directly to each dining-room server and bell attendant personally, but it does mean that a meeting plan designed specifically for all staff must be drawn up, that it must be correct, and that it be given to the people who need it. And if changes are made in the overall meeting plan, these changes have to be conveyed to those in charge of the business of staging the event. Otherwise chaos is likely to erupt.

Of course organizers' meeting plans vary in complexity with the type and size of meetings being planned, but most will include the following areas:

- the number of participants
- procedures for registering participants
- room arrangements
- food-and-beverage service
- a detailed schedule of events

## Number of Participants Expected

The number of participants expected will help determine many things, such as the size of rooms needs, the amount of food and coffee required, and the length of time needed for breaks and meals.

## Procedures for Registering Participants

Usually participants have preregistered (generally by mail) well in advance of the meeting. On the morning of the meeting, these people may confirm their registration while others may make a late registration in person.. Some conventions and trade shows require registration fees, but often it's just a matter of signing people in and giving them their registration packages containing such things as schedules of events, meal tickets, name cards, and perhaps floorplans of the building in which the conference is taking place. It's important that the registration process be smooth and straightforward, especially when you consider that often most conference participants will be arriving at about the same time.

REGISTER
HERE

Here's a look at a form called Managing Registration, taken from the Alberta Agriculture publication *A Working Guide to Planning an Event*, which you were introduced to earlier. Note how carefully worked out it is; remember, the more thorough the preparation is for every stage of planning a meeting, the fewer problems there'll be down the road.

## MANAGING REGISTRATION

| CHECKLIST | PERSON RESPONSIBLE | DEADLINE | DONE |
|---|---|---|---|
| 1) Prepare registration forms | | | |
| – design | | | |
| – include procedures for submissions of form and registration fees | | | |
| – include submission deadlines | | | |
| – make a final participant count | | | |
| – prepare a select-a-session participants lists | | | |
| 2) Provide name tags | | | |
| – select a type | | | |
| – order them | | | |
| – number them | | | |
| – code them for sessions | | | |
| – write the names | | | |
| 3) Prepare registration materials for participants | | | |
| – folders | | | |
| – program outlines | | | |
| – inserts | | | |
| – pens/pencils | | | |
| – evaluation | | | |
| – other | | | |
| 4) Arrange on-site registration | | | |
| – determine number of people needed to carry out registration | | | |
| – provide them with a schedule of the event | | | |
| – outline their repsonsibilities | | | |
| 5) Assemble materials needed at the registration desk | | | |
| – tape, felt pens, pins, scrap paper, extra name tags, scissors, stapler, etc. | | | |
| 6) Handle walk-in registrants | | | |

[1]

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[1] *A Working Guide to Planning an Event* (Edmonton: Alberta Agriculture, Food and Rural Development, 1989), 15. Reprinted by permission.

## Room Arrangements

Each meeting room must be an appropriate size for the meeting taking place in it and it must be set up with chairs, podium, and audiovisual equiment to suit the needs of the speaker and participants. Little touches like a pitcher of ice water for the speaker shouldn't be overlooked; it's often those little things that people notice most.

1. Imagine you're in charge of seeing to it that the meeting rooms for a conference are fully equipped with all the things the speakers might need. Make up a master list of things you'd need to see to. The list has been begun to get you started.

**Master Equipment List**

- flipcharts, tape, markers
- overheads, maerkers

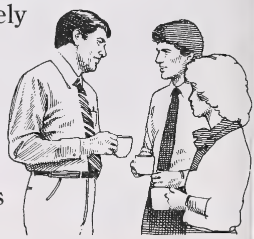
**Compare your list with the one in the Appendix, Section 2: Activity 5.**

## Food-and-Beverage Service

As you know, all but the shortest meetings require planned breaks for coffee and meals. The time allotted for these breaks will depend largely on the size of the meeting. If meals are being provided at the conference site, the banquet captain (the supervisor of staff in a banquet ball) must be provided with a list of the types of foods and beverages desired and the times the meals are to be served. Banquet captains have the experience and expertise needed to determine how much food will be needed to accommodate the number of people attending, so all considerations of this sort should be left up to them. But it's very important that you give them all the information they'll need to know; for instance, if half the expected participants have decided to buy their meals elsewhere, or if the conference involved is the annual convention of Canadian vegetarians, the banquet captain will be in trouble if it's just slipped your mind to pass on this information.

## A Detailed Schedule of All Events

Those involved in putting on a meeting have to have a minutely worked out schedule so that they can keep things running smoothly. After that, it's the responsibility of each unit contributing to the event to create its own schedule. For example, if the food-and-beverage people know that coffee breaks will occur at 10:15 A.M. and 3:00 P.M., they'll arrange their own schedule so that the coffee and other refreshments are ready and waiting just prior to these times.



Though some of the information about organizers' meeting plans that you've just been reading applies to larger meetings in particular, the fact remains that even a relatively small meeting requires planning of this sort.

2. Think back to that meeting you were planning in question 2 of Activity 4—the one intended to get people working on ways to raise money for renovating your school gym. Assume that this meeting is to be held in the gym (that way people who attend from outside the school can get a first-hand look at how run-down the facility is) and that it should take most of a Saturday afternoon.

   You're the person in charge of seeing to it that the meeting runs smoothly, so you've got to draw up an organizer's plan. You decide to begin by making a list of all the necessary little details you must be sure are seen to as the meeting is arranged.

   Teamwork

   The list has been started to get you going. See how many things you can think of to add to it. If you have a study partner, work together to brainstorm ideas.

   - *arrange with janitor to get key for room where chairs are stored*
   - *appoint someone to organize refreshments*

**Compare your list with the one in the Appendix, Section 2: Activity 5.**

Of course a list like the one you've just completed is only a preliminary step to developing a plan for those who will be in charge of arranging the meeting, but producing it should have made you realize all the little details that are so important if even a small meeting is to run smoothly. Always remember that everyone who's involved with a meeting must be kept informed, either directly or through a chain of command (for small meetings the direct method usually works best). It takes only one forgotten detail to ruin all your planning and hard work; and for a professional planner, that missed detail can very often translate into a missed opportunity for repeat business.

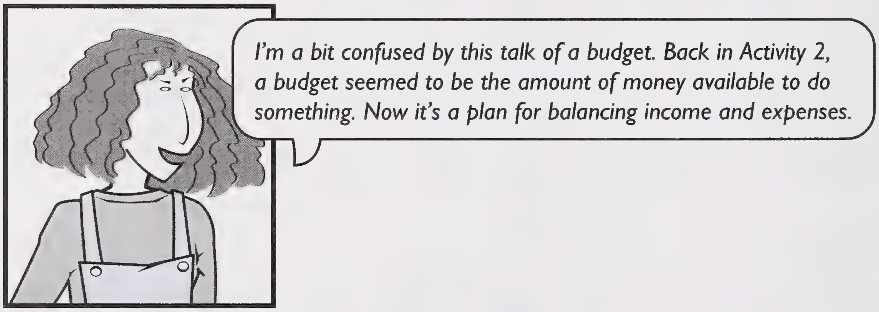
## ACTIVITY 6

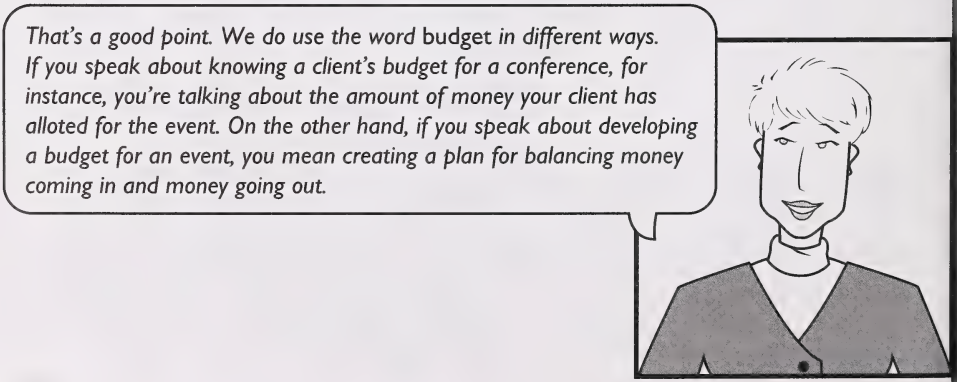
# Working Out a Budget

You're probably very familiar with the experience of wanting to buy something—a new CD, perhaps—or go somewhere—maybe to a movie—and simply not having enough money. Then perhaps you've thought back and regretted buying all that junk food at lunch or blowing your entire allowance each week on the first thing that caught your eye.

If this sounds familiar, you're not alone; most people have to learn the hard way the importance of budgeting their money—balancing their income against possible expenses to be sure there's enough money to cover the really important things. And of course when it comes to planning a meeting or conference, developing a budget is every bit as important as it is in your personal life. The best plans in the world won't come to much if there isn't enough money to pay for them. And perhaps an even worse scenario than not being able to carry out expensive plans is going ahead with them only to find out too late that they can't be paid for within the allotted budget. When this happens to professional planner, you can be sure that the person responsible will be held accountable.

Back in Activity 2 you looked briefly at the importance of knowing a client's budget when it comes to planning a meeting or conference. Now it's time to look more closely at the business of creating a budget yourself.


I'm a bit confused by this talk of a budget. Back in Activity 2, a budget seemed to be the amount of money available to do something. Now it's a plan for balancing income and expenses.

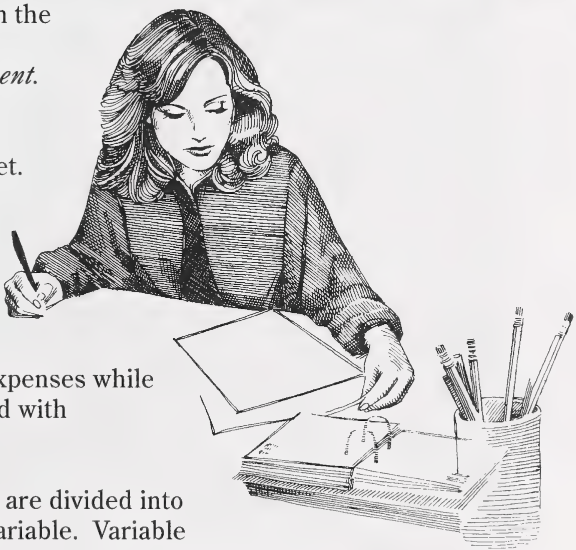

That's a good point. We do use the word budget in different ways. If you speak about knowing a client's budget for a conference, for instance, you're talking about the amount of money your client has alloted for the event. On the other hand, if you speak about developing a budget for an event, you mean creating a plan for balancing money coming in and money going out.

1. In Activity 2 you were presented with a list of likely expenses and revenue. Without looking back, list as many sources as you can of money coming in and money going out for a typical conference. Create a chart like the one that follows for your answer.

| REVENUE | EXPENSES |
|---|---|
| | |

**Compare your chart with the one in the Appendix, Section 2: Activity 6.**

What follows is a form taken from the Alberta Agriculture document *A Working Guide to Planning an Event.* This form is designed to allow planners of a conference or some other sort of event create a budget. Dollar figures have been added to the form.



As you study the form, here are a few things to note:

- The top half is devoted to expenses while the bottom half is concerned with revenue.
- Both expenses and revenue are divided into two categories: fixed and variable. Variable expenses can more easily be changed if necessary; fixed expenses can'be altered.
- The form allows planners to fill in dollar amounts in three columns: The actual costs and revenues of the last event held, the projected costs and revenues of the event being planned, and (to be filled in later) the actual costs of that same event when they become known.
- Some of the terms used vary from the one presented in Activity 2; for instance, rather than *salaries*, the form uses the more specific *Speaker Fees.* You should't have any trouble matching up the meanings of different terms of this sort.

Now study the form. Then answer the questions that follow.

## BUDGETING FOR AN EVENT

| | Actual cost of last event | Projected | Actual |
|---|---|---|---|
| EXPENSES | | | |
| **FIXED EXPENSES** | | | |
| Facility | $ 250 | $ 275 | $ 275 |
| Speaker Fees | 400 | 500 | 500 |
| Refreshments | 200 | 200 | 200 |
| Advertising | 150 | 250 | 200 |
| **VARIABLE EXPENSES** | | | |
| Name Tags | $ 25 | $ 30 | $ 35 |
| Handout Materials | 45 | 45 | 55 |
| Door Prizes | 150 | 150 | 150 |
| Miscellaneous (phone, mileage, photocopying) | 200 | 250 | 200 |
| Total Expenses: | $1420 | $1700 | $1615 |
| REVENUE | | | |
| **VARIABLE REVENUE** | | | |
| Registration Fees | $ 750 | $ 820 | $ 745 |
| **FIXED REVENUE** | | | |
| Donations | $ 220 | $ 450 | $ 300 |
| Exhibitors' Charges | 500 | 475 | 445 |
| Total Revenue: | $1470 | $1745 | $1490 |
| Profit/Loss:<br>(Total Revenue – Total Expenses = Projected Profit/Loss) | | | – $125 |

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[1] *A Working Guide to Planning an Event* (Edmonton: Alberta Agriculture, Food and Rural Development, 1989), 9. Reprinted by permission.

2. What advantages are gained by including in this planning chart the costs and revenues of the last event to be held?

3. Did the last event held come in within its budget? In your response, explain how you can tell.

4. Note that as the event was being planned, it was expected that there would be a surplus of $45.00 after the event ($1745.00 – $1700.00). As things turned out, however, there was a shortfall of $125.00.

   a. Where did the planners' projections go wrong?
   b. Suggest what the planner could do the next time to avoid this situation.

**Compare your answers with those in the Appendix, Section 2: Activity 6.**

Note that the chart you used to answer the preceding questions is based on the assumption that there's no money available for the conference being planned other than what the event itself can generate—by way of donations, registration fees, and payments from exhibitors. Often, however, an organization planning a conference will allot an amount of money up front to cover many of the expenses. When this happens, this money is said to have been *budgeted* for the event, and there are usually no expectations of getting it back. It would be easy to adapt your chart to fit this sort of situation—and it makes the planner's job just a bit easier.

Careful budgeting is a crucial part of planning a meeting or conference. Whether the dollars involved number in the tens or the hundreds of thousands, the same basic principle holds true: revenues, along with any money budgeted for the event, must at least equal—and preferably surpass—expenses. Otherwise, someone's neck is likely to be on the chopping block. If you're the head planner; it will likely be yours.

## ACTIVITY 7

# Evaluating the Meeting

At this point you're likely asking yourself what other steps there can possibly be in putting together a meeting. The good news is that as far as the actual planning goes, you've covered—at least in general terms—most of the territory. The bad news (depending on your point of view, of course) is that a competent planner's job isn't finished when the meeting or conference is over; this is the time when the event should be carefully evaluated to find out what worked well and what could be improved for next time.

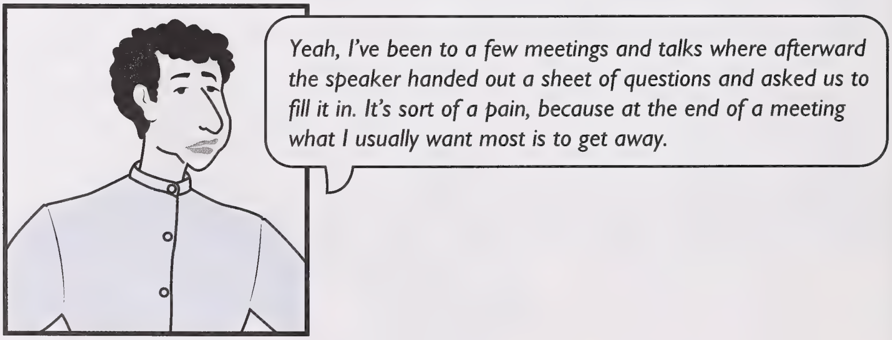
Actually, good planners will usually try to evaluate meetings they've organized from two perspectives:

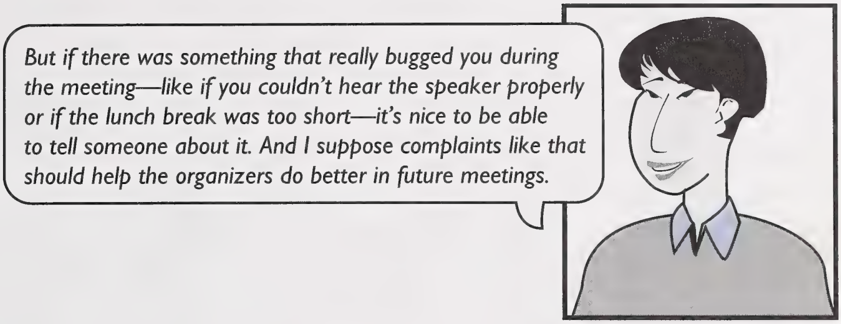
- from the point of view of the participants in the meeting
- from the point of view of the people involved in organizing and staging the event

One tool planners often use to accomplish this task is the survey or questionnaire. Separate questionnaires can be drawn up for participants and organizers. If a planner wants to get useful information from questionnaires of this sort, it's vital that the right questions be asked. Careful planners are constantly revising and refining their questionnaires so as to be able to fine-tune the events they plan.

### Evaluation from the Participants' Perspective

If you've attended workshops or seminars, you may have been asked to fill out evaluative questionnaires at the end of the sessions. These questionnaires have been designed to tell the speakers and/or the meeting planners what you liked and didn't like about the meetings.


Yeah, I've been to a few meetings and talks where afterward the speaker handed out a sheet of questions and asked us to fill it in. It's sort of a pain, because at the end of a meeting what I usually want most is to get away.


But if there was something that really bugged you during the meeting—like if you couldn't hear the speaker properly or if the lunch break was too short—it's nice to be able to tell someone about it. And I suppose complaints like that should help the organizers do better in future meetings.

Of course planners want to know what they've done right as well as wrong. In fact, it's important that they get as much constructive feedback as they can so they can improve their product next time. That means that the questionnaires they develop have to be carefully thought out. Since most people won't spend a great deal of time filling them in, questions must be carefully worded and to the point.

1. Think back once again to that meeting you were planning in earlier activities—the one intended to begin the process of raising money for your school gym. Since you'll be helping to plan other meetings in the future as you continue the work of fund-raising, it's important to you to find out participants' views on the strengths and weaknesses of this first meeting.

   Teamwork

   Design a questionnaire you intend to give to all the participants asking them to evaluate the meeting. Think hard about just what you want to find out and what questions will give you this information; then design your questions accordingly. Your questionnaire can't be too long, so each question has to count. Work with your study partner if you have one.

   The questionnaire has been begun for you, but feel free to change the format.

### YOUR THOUGHTS ON THE MEETING

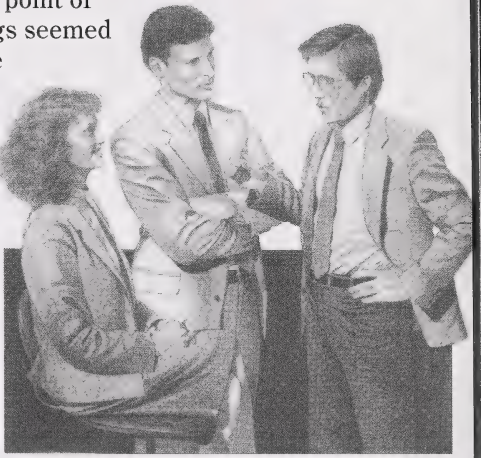
**Because this is the first of what we hope will be a series of meetings designed to generate ideas for our renovation project, we'd like your ideas on how to improve the way we're doing things. Please take a few minutes to answer the questions that follow, and leave your completed questionnaire on the table by the door as you leave the gym. There is no need to sign your name unless you want to. Thank you for your cooperation.**

**1. Did you find today's meeting to be well organized? If not, please provide details.**

______________________________________________

**Compare your answer with the one in the Appendix, Section 2: Activity 7.**

## Evaluation from the Organizers' Perspective



Of course it's quite possible that from the point of view of the participants of a meeting things seemed to go along without a hitch while from the perspective of all those people working to organize and stage the event, it was one big nightmare. This situation is very unlikely because bad planning will usually result in unhappy participants; but a good staff can do much to compensate for bad planning, so there may be behind-the-scenes problems that the participants never noticed. For this reason, it's important to have the organizers and key players in any meeting tell you their thoughts on how things were done.

The best way to do this is usually to have an open discussion with a free exchange of ideas. A questionnaire can also play a role here, however; having to express ideas in writing can often help people think them through and explain them more fully.

Teamwork

2. With your study partner if you have one, design a second questionnaire, this one to be filled out by people who worked behind the scenes in organizing and staging the same gym-renovations meeting. Once again, the questionnaire has been started for you, though you may vary the format if you wish.

### AN EVALUATION OF OUR FIRST MEETING

**We've all worked hard to make this meeting a success, but our job is only beginning. Please take some time to fill out the questionnaire that follows and leave it in the box by the backstage door of the gym. Don't sign your name unless you want to.**

1. **Do you think we did a good job in advertising the meeting? If not, how could we improve things next time?**

______________________________

______________________________

______________________________

**Compare your answer with the one in the Appendix, Section 2: Activity 7.**

There are many ways questionnaires can be structured. You might, for example, have questions that could all be answered on a scale of 1 to 5, with 5 meaning Agree Strongly and 1 meaning Disagree Strongly. This sort of format makes it easy for delegates to complete their surveys ad for organizers to tabulate the results, but it doesn't give respondents any room to express their own views. And of course there are other ways to evaluate the success of your meetings altogether, such as seeing how many people show up next time, noting how much enthusiasm seems to have been generated by the project, and simply by asking around for people's thoughts. No matter how you go about evaluating a meeting you've planned, it's always important to get feedback; that way you can keep on getting better at planning and making fewer and fewer mistakes.

## FOLLOW-UP ACTIVITIES

If you had difficulties understanding the concepts in the activities, do the Extra Help. If you have a clear understanding of the concepts, do the Enrichment.

### Extra Help

We need order in our lives—and for a meeting planner order is of absolute prime importance. That's why competent, responsible planners make sure they work methodically through each step of the planning process. That process involves doing the following:

- developing an overall meeting plan
- making sure you know just what resources you'll need and what you have to work with
- developing an agenda and presenting it to participants in a clear, usable format
- creating an effective marketing plan
- preparing a meeting plan for the organizers of the meeting
- working out a budget
- developing a means of evaluating the meeting after it's over

For more practice in several of these steps of the planning process, answer the following questions.

1. In Activity 4, question 2 you were given the scenario of a meeting planned to begin a process of raising money to improve your school gym. You used this meeting to practise several steps in the planning process—for example, developing a marketing plan and creating a method of evaluating a meeting. However, you never actually developed an overall meeting plan for this event.

   Look back at Activity 1 and take the meeting plan form you generated there. Then fill it in for the meeting planned for the gym project. You may have to adapt the form slightly, and be prepared to make up some information.

2. As a member of your student union, you're in charge of a committee that's planning a dance at your school. You're in the early planning stages, and you're taking stock of the resources you'll need. Review the material in Activity 2; then make a list of the various resources you'll have to arrange for if your dance is to be a success (you may have to adapt the resources list given in the activity slightly). For each item in your list, write a sentence or two to describe just what's involved in arranging for that resource. The list has been begun for you.

   - *facility—school gym: Permission to use the gym must be obtained and a key provided for. Arrangements must be made to decorate the gym before the dance and to clean it up afterward.*

3. Your committee (see question 2) wants to make sure there's a good turnout for the dance. In a paragraph, present an informal marketing plan; in other words, describe how you'd go about creating awareness of the dance in your school—along with some excitement and anticipation.

4. Every year the Olsen clan has a big family reunion back in the small community where the family farm is located. Because there are so many members of the extended family (179 people are expected to attend this year), this is really quite an affair; they rent a local community centre for the weekend, have at least one big meal catered by a local business, and hire local musicians for a Saturday-night dance. This year Lorne Olsen and his wife, Adrienne, have the job of looking after the financial planning for the event. As far as they can tell, these are the projected figures they have to work with:

| | |
|---|---|
| • surplus from last year's reunion (to be used this year) | $210.00 |
| • rental fee for the community centre | 275.00 |
| • catering costs | 650.00 |
| • per-person contribution | 12.00 |
| • band payment | 800.00 |
| • name tags (not everyone knows each other) | 45.00 |
| • game prizes | 300.00 |
| • miscellaneous costs | 250.00 |

Work out a budget to see if Lorne and Adrienne are going to be able to finance this year's reunion successfully. Use the form from Activity 6 as a model, but adapt it to fit this situation. Your adapted form, for instance, will require only one column—for the projected costs of this year's reunion. (If you wish to use a spreadsheet application on a computer to do this, you certainly may, though for so small an operation it likely won't be worth your time unless you simply want the practice.)

Technology

**Compare your answers with those in the Appendix, Section 2: Extra Help.**

## Enrichment

Do **one** or **more** of the following:

Task Management

1. Find some meeting or related event going on in your school or community and attend it; if it's a meeting not ordinarily open to the public, you'll have to ask permission to attend, explaining that you're a student taking a course in meetings and conferences.

   While at the meeting, note carefully how—and how well—it's been organized. Is there a clearly presented, functional agenda? Have things like seating, refreshments, parking spaces, room arrangement, and audiovisual equipment been adequately provided for? Use the material you've studied in this section to generate ideas for questions.

   If possible, arrange to speak after the meeting with the person in charge of planning it. Ask this person a few questions about how the planning was organized and carried out. Here are a few sample questions you might ask:

   - Did the planner draw up a meeting plan of some sort?
   - Was a marketing strategy developed and used?
   - Did the planner develop and work within a budget?
   - Were other people who were involved in organizing the meeting provided with a meeting plan?
   - Were steps being taken to evaluate the success of the meeting? What were they?

You'll probably be able to add questions of your own and adapt and expand on the ones suggested here to suit the meeting you've attended. Be sure when speaking with the planner to be polite and to explain why you're after this information. Try to have your questions well prepared, and see that they're to the point. Be sure to take notes, and you might even record the discussion on audiotape, but be sure to get the planner's permission to do this first. Don't forget to thank the planner after the discussion for taking the time to talk with you.

Communication

Teamwork

Once you've got all the information you can get, write up a report on the meeting. In your report, point out both the strengths and weaknesses of the event, and suggest how things could be improved. If you're working with a study partner, exchange your reports; if not, read your report to a friend or family member and ask for constructive feedback.

2. This section has introduced you in a general way to the business of planning a meeting. If you're interested in learning more about the finer points of this sort of thing, a wonderful resource is David R. Jedrziewski's *The Complete Guide for the Meeting Planner.* Check with your tourism studies teacher or school librarian to see if they have this volume. If they do, take some time to read through what it suggests about the various steps in planning a meeting. You'll be surprised at how challenging a business it can be!

Technology

3. If you have access to a computer connected to the Internet, select a few Canadian provinces you'd like to visit and search out information on them. See if you can find references to other pages designed specifically to attract convention business. For instance, when this course was being written, Prince Edward Island's Convention Bureau had a page called Convention Planner's Guide (http://www.gov.pe.ca/conv/index.html). It offers all sorts of help and information to people thinking of holding a convention in that province.

   If you can find a few pages like this, take some time and see what you can dig up. Which provinces seem to be most interested in attracting convention business? Which ones offer the best help? Now why not look up other countries you'd enjoy travelling to and see what they offer in the way of convention facilities and attractions?

   If you get into the habit of using the Internet to look for information of this sort, you'll be surprised what you'll learn.

**Compare your answers with those in the Appendix, Section 2: Enrichment.**

## CONCLUSION

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This section has illustrated the multiple responsibilities facing a meeting planner each day. The lists and the procedures you've been studying are all very important in the process of planning a successful meeting. Meeting planners must always be aware of details, yet they must also be creative. No two meetings are the same. As a meeting planner, you'll need to be organized and attentive to your customers' needs and expectations as well as versatile and imaginative—all at the same time. By giving careful consideration to each of the processes you've studied in Section 2, from the development of a meeting plan to an evaluation of the event when it's over, you should now be able to make a valuable contribution to the planning of any event!

**ASSIGNMENT**

Turn to your Assignment Booklet and do the assignment for Section 2.

## SECTION 3

# Job Opportunities in Meetings and Conferences

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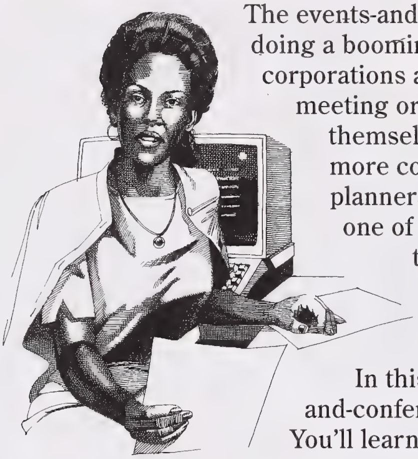
Now that you know something about planning meetings, conferences, and other sorts of events, do you think you might be interested in pursuing a career in this area? This last section of the module will offer you guidelines on employment opportunities in the events-and-conferences sector of the tourism industry.

When you're finished the section, you should know how to research both employment opportunities and sources of further education in the area. As well, you should be able to assess your own aptitudes and personal qualities as they relate to careers in this sector. By the end of the section you should have the information you'll need to decide if a career in this area of the tourism industry is perhaps in your future.

## ACTIVITY 1

# Researching Employment Opportunities

## The Job Profile



The events-and-conferences sector of the tourism industry is doing a booming business these days. In the past, when corporations and other associations would decide to hold a meeting or conference, they'd usually arrange things themselves; but today the world has become a much more complex and specialized place, and professional planners are in demand. And though this sector isn't one of the largest employers in the tourism industry, there certainly are good career opportunities for people in the area who have the right qualities and who are willing to work hard.

In this activity you'll research jobs in the events-and-conferences sector that might be of interest to you. You'll learn about working conditions, training requirements, and opportunities specific to each job you research. With this knowledge, you'll be better able to decide if this sector of the tourism industry offers the kind of future that you might enjoy.

Focus Canada

For an introduction to some of the different jobs available in the sector, turn in your textbook to page 211 and read from the heading Jobs in the Meeting Business through to the bottom of page 214. As you read, think about which two or three jobs described interest you most. As far as possible, try to select these jobs from at least two of the three different levels presented in the chart at the bottom of page 212—front line, supervisory, and management.

**career path:** *the sequence of jobs a person follows, usually in a chosen occupation or industry or aiming at a specific goal*

As people gain experience in their field, most welcome the chance to take on greater responsibility along with a higher salary and improved working conditions. That means that it's helpful to formulate a **career path**—a sequence of jobs that you might like to follow throughout your career. For instance, if it's your ultimate ambition one day to be a convention-centre manager but you're just starting out, it might be a good idea to get in on the ground floor as host or hostess or a registration clerk and start learning the ropes from the bottom up.

With the knowledge and experience you gain by working in positions like these, along with some extra training and education (which you'll be looking at in the next activity), you may be on your way to becoming qualified one day for a supervisory job. And after that, who knows—that manager's position just might be within reach.

1. Considering what you know of job possibilities in the area of meetings and conferences, list the **two** jobs that interest you most.

**job profile:** *a concise description of the duties and requirements of a specific position*

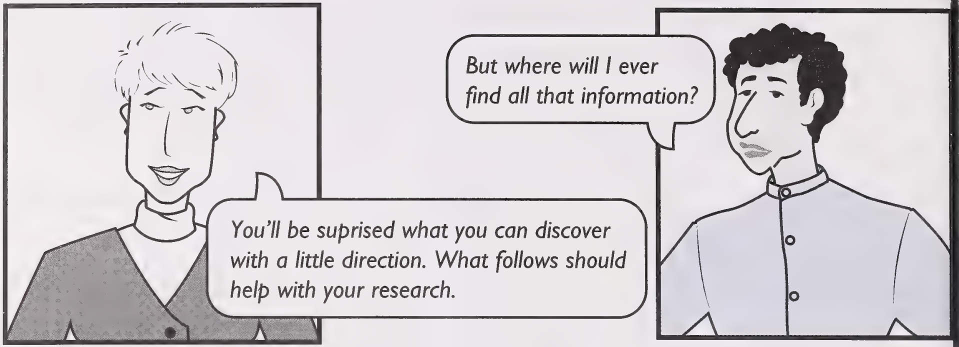
For each of the two jobs you've chosen you'll now develop a **job profile**, a concise summary that describes the most important aspects of the job. Each job profile will be divided into nine sections for easy reference. What follows is a description of these sections.

Careers

- **Job title:** This is self-explanatory. Simply indicate the precise name of the position.
- **Job level:** Here simply describe the level of the position using one of these terms— front line, supervisory, or management.
- **Duties:** Explain here what it is a person in this position actually does.
- **Working conditions:** Here you should discuss things such as the kinds of hours or shifts that are required in this position, whether the job involves working indoors or outdoors, whether it involves working with people or behind the scenes, and so on. You should also explain any special demands of the job, such as long hours or a great deal of travel.
- **Skills:** In this section try to outline what personal qualities a person should have for this position and what abilities he or she should possess to do the job well. For example, does the job require good communications skills? a facility with languages? an ability to work under pressure? a talent for working with numbers?
- **Knowledge:** In this section explain what a person must know to do this job. For example, an interpreter must know specific languages while a guide must be very familiar with a physical location.
- **Education:** Here tell the minimum level of schooling a person filling the positon must have including high school, college or university, and industry certification.
- **Experience:** In this part you should indicate the approximate number of years in the tourism industry that are normally required for someone doing this job. Remember that the only positions that wouldn't require some related experience are the front-line, **entry-level jobs**.

**entry-level job:** *a job requiring no background experience and minimal training and skills*

- **Career path:** Finally, in this section point out at least one other job that you might move into from the one you're describing. Of course if the position is a top-level management job, this may not be possible.


But where will I ever find all that information?
You'll be suprised what you can discover with a little direction. What follows should help with your research.

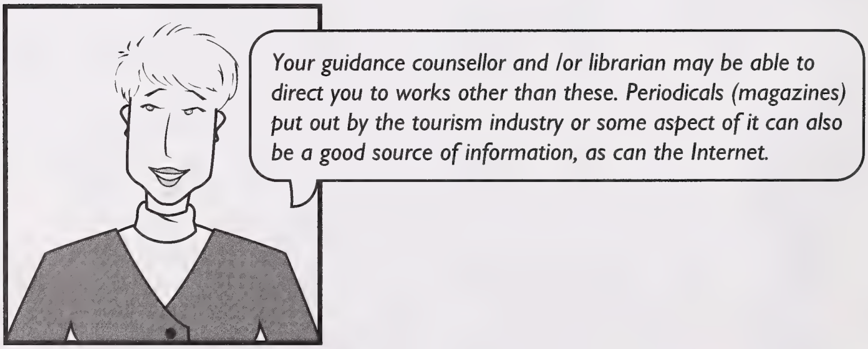
## Doing the Research

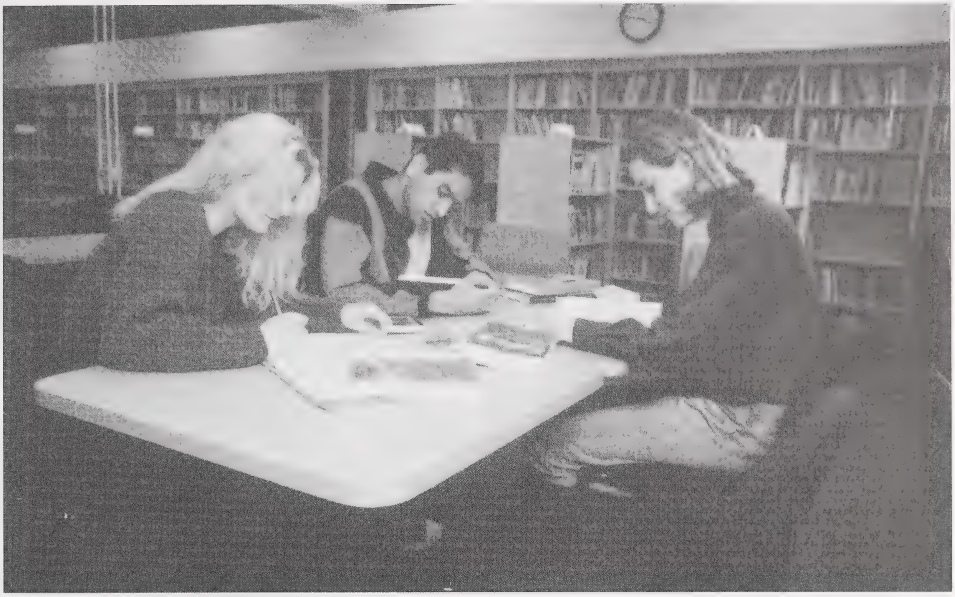
### Literature

Task Management

Your guidance cousellor or your school or public library may have copies of the following publications. If not, they should be able to help you locate them. These works provide information on jobs and educational programs in tourism studies.

- *Tourism: Joining Alberta's Best—Resource Kit*, produced by the Alberta Tourism Education Council and the Tourism Industry Association of Alberta
- *The Yellow Brick Road: Your Career in Hospitality and Tourism*, published by Kostuch Publications, Toronto
- *The Student's Travel Map: A Guide to Tourism Careers, Education and Training*, produced by the Canadian Tourism Human Resource Council and the Pacific Rim Institute of Tourism
- *Check It Out! Is There a Tourism Career in Your Future?*, produced by the Alberta Tourism Education Council


Your guidance counsellor and /or librarian may be able to direct you to works other than these. Periodicals (magazines) put out by the tourism industry or some aspect of it can also be a good source of information, as can the Internet.



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## Tourism Associations

Task Management

Agencies and organizations that support the tourism industry may be able to help you in your research. Probably the best organization for providing information on employment in the industry is the Alberta Tourism Education Council (ATEC). This organization, responsible for promoting tourism education in Alberta, has information and resources regarding employment in the industry, including job profiles, career information, certification guidelines, and a host of other topics. Many high schools have a copy of ATEC's kit *Tourism: Joining Alberta's Best* (mentioned above under the heading *Literature*), which is an entire binder full of information about jobs in the tourism industry and other sources you can go to for more information. You can contact ATEC at this address:

The Alberta Tourism Education Council
12th Floor, Sterling Place
9940–106 Street
Edmonton, Alberta
T5K 2N2
Phone: (403) 422–0781
Fax: (403) 422–3069

Another organization you can contact is

Alberta Tourism Partnership
Suite 808, 205–9th Avenue S.E.
Calgary, Alberta
T2G 0R2

## Interviews

Task Management

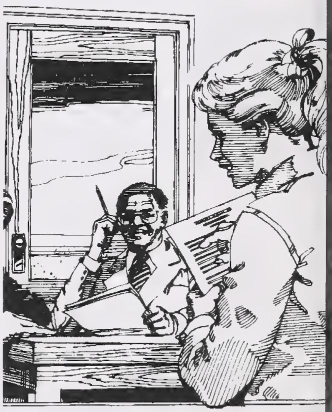
One of the best ways to get information about a specific job is to talk with someone who's doing that job or has done it in the past. Try contacting a hotel or convention centre and arranging an interview in person or over the phone with an appropriate employee. If the position in which you're interested doesn't involve working directly for a hotel or convention centre, your learning facilitator or guidance counsellor should be able to direct you to the right place, or you can contact ATEC and ask for help.

If you're uncomfortable with the idea of conducting an interview, the following pointers should help.

- Prepare beforehand. Have all the questions you want to ask written down in a logical order. Concentrate on questions that are specific to the job you're investigating rather than to conference planning or tourism in general

- When you arrange the interview, try to find a time when the employee isn't usually very busy. You'll be able to get much better information if he or she isn't rushing to get back to work. Also, plan your interview to take no more than ten or fifteen minutes and stick to that schedule. Get your information, thank your interviewee, and let him or her get back to work.

- If you're conducting the interview in person, be sure to dress appropriately. No matter where you go, don't wear jeans. A well-groomed, professional appearance will make people take you more seriously and be more willing to give you their time. Besides, who knows? If you really are interested in a job in the area of meetings and conferences, you may be back at this same hotel looking for a position someday. Always leave the best impression possible.



- Keep your questions on a professional level. Asking questions that are too personal, such as exactly how much money a person makes, may make the interviewee uncomfortable and you'll end up ruining the mood of your interview. If you see that something's making the person uncomfortable, move on to something else.

- Listen carefully, and take notes. If you wish to record the interview on audiotape, be sure to get permission first from your interviewee.

- Keep the interview down to a reasonable time. Tell your interviewee how long the talk will last and be sure you keep to that time frame.

- Thank your interviewee when the discussion is over. Following up with a brief thank-you note a few days later is a very nice touch.

## Constructing the Profile

2. Now you're ready to do your research and construct your profiles. Use the job-profile format illustrated here for each of your chosen positions.

**Job #1 (or 2 or 3)**

**Job Title:** ____________________

**Department:** ____________________

**Job Level:** ____________________

**Description of Duties:** ____________________
____________________
____________________
____________________

**Working Conditions:** ____________________
____________________
____________________
____________________

**Skills:** ____________________
____________________
____________________

**Knowledge:** ____________________
____________________
____________________

**Education:** ____________________
____________________
____________________

**Experience:** ____________________

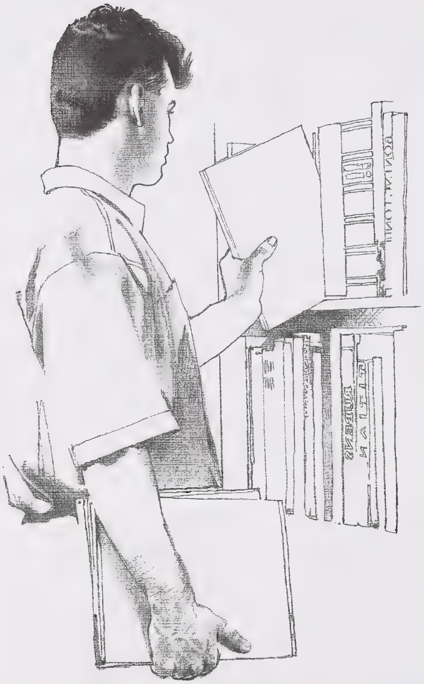
**Career Path:** ____________________
____________________
____________________

**Compare your job profiles with those in the Appendix, Section 3: Activity 1.**

This activity probably required considerable time on your part, especially when it came to finding the information you needed. If you're the kind of person who finds it difficult to approach people you don't know, it may have required a bit of courage too. However, consider it time and effort well spent. Not only did you learn about specific jobs in the events-and-conferences sector that might appeal to you, but you'll find the process you went through to be a useful one for researching any job that may be of interest, no matter what the industry. Be sure to keep it in mind as you consider your career options.

## ACTIVITY 2

# Researching Training and Education



If in Activity 1, if you interviewed an older person who'd had a career in the tourism industry, you may well have discovered that he or she began with an entry-level job somewhere in the industry and, through ability and hard work, worked along a career path that ultimately may have led to a supervisory or management position. In fact, this person's early jobs may not even have been in the events-and-conferences sector of the tourism industry; for instance, he or she might have started as a front-desk clerk in a hotel and gradually worked up through various hotel positions before arriving in the conventions and events end of the hotel's operations.

Traditionally this was how people pursued careers throughout the tourism industry, but today things have changed. Of course things like ability, enthusiasm, and hard work still count a great deal; but in our complex and highly competitive world, education and training have become every bit as important. And this is especially true of the meetings and conventions end of the industry, where training in areas like marketing, sales, and communications is a tremendous asset.

Careers

When you were doing your research for Activity 1, you investigated the education required for each of the positions you were looking into. If you did a bit of digging, you probably came upon quite a few different educational institutions offering courses in various aspects of the tourism industry. As the industry continues to develop and grow, more and more schools, colleges, and universities are providing tourism-related courses. And of course at the same time it's becoming increasingly common for companies in the industry to offer training programs to keep their employees up-to-date and constantly improving their skills.

What does all this mean for you? Well, if you're seriously considering a career in the area of meetings and conferences—or in any other part of the tourism industry—it means you'll likely have to be prepared to continue your formal education as well as getting on-the-job experience. In this activity you'll get a bit of help in going about discovering what options exist to help you do this.

If you do decide on a career in the events-and-conferences sector, you'll want to make the best choice possible when selecting an educational program. If you have an interest in a particular aspect of this sector, try if you can to gain some experience working at a related entry-level job by **job shadowing** and/or through work experience and career-preparation programs at school. It might be a good idea to explore different areas before making a choice.

**job shadowing:** *sticking very closely to someone in a particular job for a specified time to experience just what that job involves*

Of course, in making decisions like this, the more you know, the better. Try reading a variety of course catalogues from a number of postsecondary educational institutions. You should be able to find these at your career counsellor's office, at your local or school library, from your tourism studies teacher or learning facilitator, or directly from the institutions themselves.

You should carefully consider the suitability of any program in which you're interested. Will the program provide you with skills and knowledge you'll be needing? Are the educational institution and its graduates highly regarded in the industry? If you're not sure, get on the phone and make enquiries. You might start by contacting the human-resources manager or training manager of a large hotel or convention centre and asking their opinions; they may well have recommendations of their own.

Naturally you'll want to consider the length, cost, and content of any program you're looking at. How long a program can you commit yourself to? Don't forget that tuition costs vary; and you'll also have to calculate the costs of living away from home (if this applies to you), transporation, textbooks, and so on. Do you want a classroom-based program providing little practical experience, or would you prefer a program combining classroom instruction with hands-on practice? Finally, you'll want to know if the program results in certification, a diploma, or a degree.

Careers

1. In Section 1: Activity 1 you were asked to contact a number of postsecondary institutions for information on their courses and programs that relate to the events-and-conferences sector of the tourism industry. Now it's time to examine the information you've received. Compare **two** programs that interest you by constructing a chart like the one that follows and filling it in.

### A TWO-PROGRAM COMPARISON

| | |
|---|---|
| **Name of institution** | **Name of institution** |
| ______________________ | ______________________ |
| **Location** | **Location** |
| ______________________ | ______________________ |
| **Residence facilities** | **Residence facilities** |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| **Type of position prepared for** | **Type of position prepared for** |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| **Type of study** | **Type of study** |
| ______________________ | ______________________ |
| **Duration** | **Duration** |
| ______________________ | ______________________ |
| **Entrance Requirements** | **Entrance Requirements** |
| ______________________ | ______________________ |
| ______________________ | ______________________ |

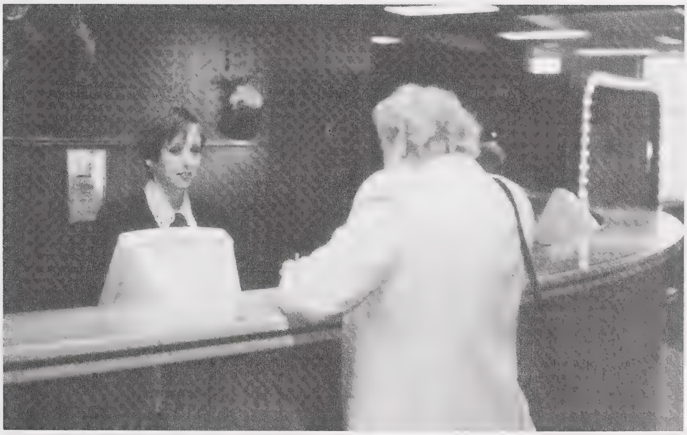
| | |
|---|---|
| **Work experience** | **Work experience** |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| **Tuition** | **Tuition** |
| ______________________ | ______________________ |
| **Books and supplies** | **Books and supplies** |
| ______________________ | ______________________ |
| ______________________ | ______________________ |
| **Residence fees** | **Residence fees** |
| ______________________ | ______________________ |

Teamwork

2. Now consider the two programs you've compared. Which one would you choose? Explain your reasons. If you're working with a study partner, compare your choices and discuss your reasons.

**Compare your answers with those in the Appendix, Section 3: Activity 2.**

In this activity you've gone some way toward researching sources of further education and training in the area of planning meetings and conferences. Of course, if you're really interested in this field, you should do a lot more digging, but now you should have a good idea of how to go about finding out what you need to know. But how do you know that you're temperamentally suited for a job in this sector of the tourism industy? The next activity should help you answer that question.



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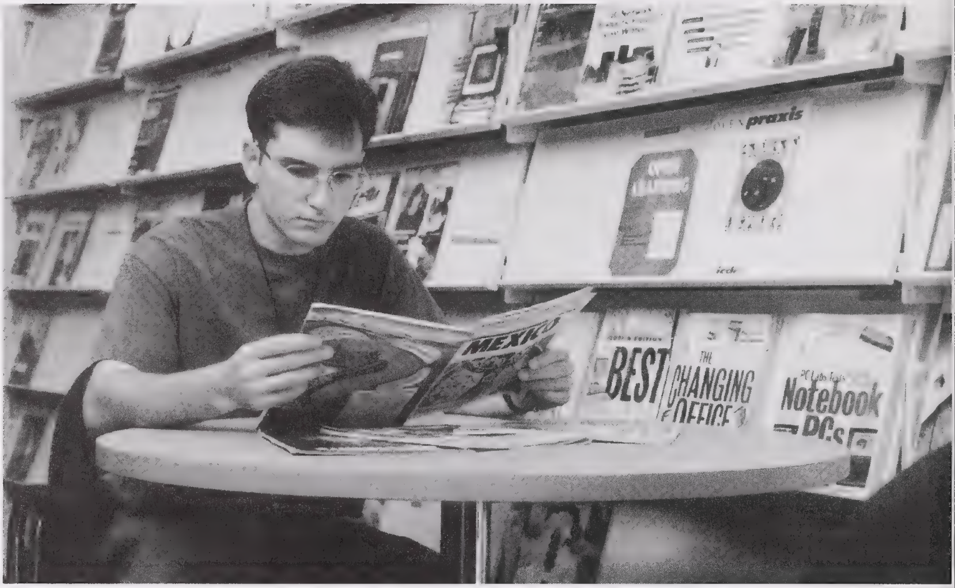
## ACTIVITY 3

# Are You the Right Person for the Job?



Careers

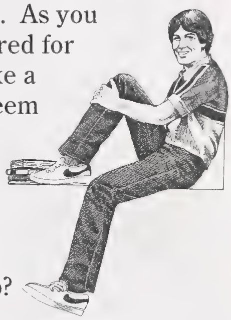
You're all set for a career in the meetings-and-conferences area of the tourism industry. You've decided that tourism is right for you because you enjoy working with people, you love to travel, and you have a thirst for adventure. You enter a training program or perhaps you get an entry-level position and suddenly things start to fall apart. Instead of travelling or having adventures, you find yourself called upon to be a salesperson, a public-relations expert, a meticulous record keeper, and a negotiator. The pleasure you take in working with people is just about the only thing that keeps you going.

What's wrong with this picture? The fact is that you simply failed to assess your own skills and aptitudes and match them with those required for the job you've undertaken. Probably you'd have done much better in the adventure-and-recreation or travel-trade sectors of the tourism industry.

When contemplating a career, it's very important to take an honest look at yourself—your values, aptitudes, and skills along with your chief strengths and weaknesses—and see how well they'd suit you for the career in question. This activity is designed to help you with this process in relation to the events-and-conferences sector of the tourism industry.

Task Management

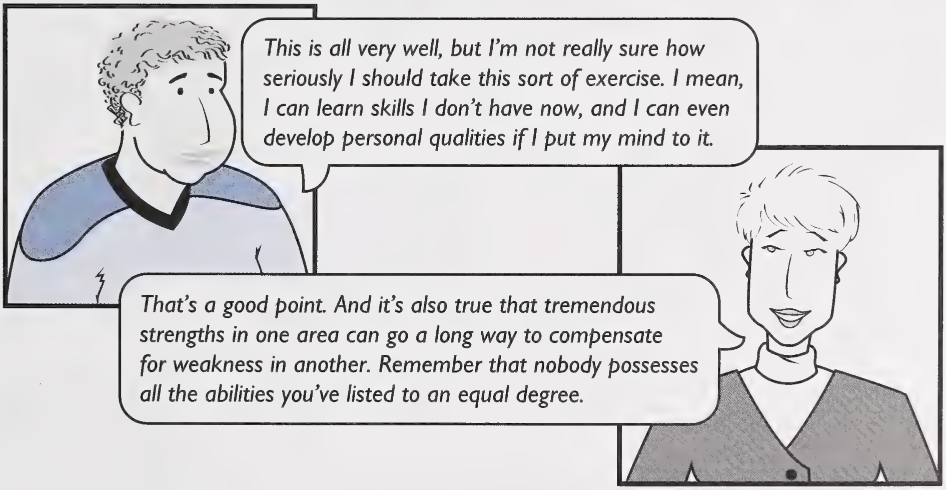
1. In your textbook reread page 200 and then pages 211 to 214. As you read, jot down the skills, personal qualities, and so on required for the various positions discussed. When you've finished, make a master list of the basic skills, qualities, and aptitudes that seem to you to be important for people working in this sector of the tourism industry. If you have access to books like *The Student's Travel Map*, you can use them as well to develop your list.



2. Now compare yourself to your list. How do you measure up?
   a. Rate yourself for each item you've listed on a scale of 1 to 3.
   b. Now add up your score and compare it to the highest score possible (for instance, if you have ten items on your list, the highest score possible is 10 x 3 = 30). Work out your score as a percentage of this highest possible score. See the Appendix for an assesment of your results.
   c. Often people find it difficult to assess themselves. If you have a study partner, use your lists to compare each other. If you're working on your own, ask a friend or family member to assess you. But be sure they do it honestly; this is too important a task for flattery.

Teamwork

**Compare your answers with those in the Appendix, Section 3: Activity 3.**


This is all very well, but I'm not really sure how seriously I should take this sort of exercise. I mean, I can learn skills I don't have now, and I can even develop personal qualities if I put my mind to it.
That's a good point. And it's also true that tremendous strengths in one area can go a long way to compensate for weakness in another. Remember that nobody possesses all the abilities you've listed to an equal degree.

The work you've just done should help you answer the question of whether or not you're personally suited for a career in this sector of the tourism industry; but remember that if your desire is strong enough, you can overcome many weaknesses and acquire many skills. But whatever your thoughts are on your future career, it's important to have a realistic view of yourself and the career path you're contemplating.

Life is a constant process of self discovery, and perhaps the best way of discovering new aspects of your own personality is to try new things and welcome different experiences. A summer job, work experience at school, volunteer work—perhaps it's through the sort of exposure that experiences like these can give you that you can best decide whether a career in meetings and conferences is right for you.

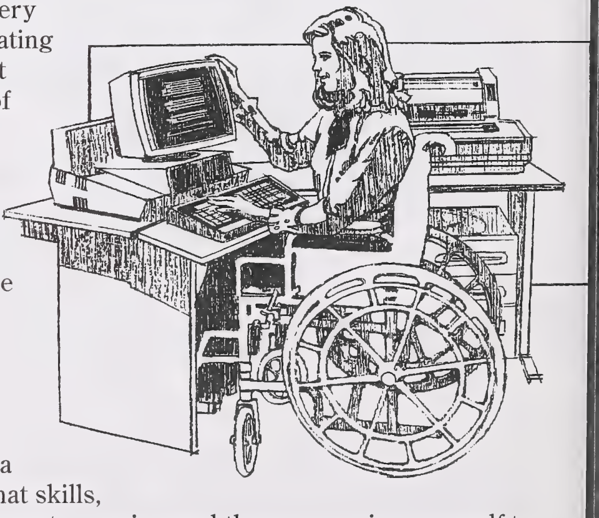
## FOLLOW-UP ACTIVITIES

If you had difficulties understanding the concepts in the activities, do the Extra Help. If you have a clear understanding of the concepts, do the Enrichment.

### Extra Help

In this section you've worked on three separate but closely related processes:

- researching various occupations in the area of planning meetings and conferences
- researching educational programs designed to prepare people for careers in this area
- assessing yourself as a candidate for positions in this sector of the tourism industry



These three processes are all very important for anyone contemplating a career. Even if you doubt that you'd like a career in the area of meetings and conferences, the research and self-evaluative skills you've been practising should stand you in good stead as you contemplate other job possibilites. The more practice you get in this sort of thing the better.

Careers

1. So far you've been approaching this sort of exercise by beginning with a specific job, determining what skills, aptitudes, and training it seems to require, and then comparing yourself to what's needed to see if you might make a good candidate for the position. But it can also be valuable to approach the issue that other way around—assessing your own personal qualities first and then trying to discover what career areas they might suit you for.

a. Construct a personal profile of yourself. Set up a format like the one that follows, but feel free to adapt it in any way you think useful. Leave as much room as you wish for each section. Think carefully before filling out your profile; make sure your assessment is as accurate as you can make it.

**Name:** ____________________

**Favourite Pastimes/Hobbies:** ______________________________

______________________________

______________________________

**Best/Favourite School Subjects:** ______________________________

______________________________

______________________________

**Worst/Least Favourite School Subject:** ______________________________

______________________________

______________________________

**Personal Strengths:** ______________________________

______________________________

______________________________

**Personal Challenges:** ______________________________

______________________________

______________________________

**Outstanding Skills:** ______________________________

______________________________

______________________________

**Chief Goals in Life:** ______________________________

______________________________

______________________________

**Most Strongly Held Values:** ______________________________

______________________________

______________________________

b. Now go back to the research you did in Activities 1 and 3 into jobs in the meetings-and-conferences area and look at the skills and aptitudes required for the various positions.

1) For which jobs do you think you're personally best suited? For which do you seem to be least suited?

2) Generally speaking, in view of all you've learned about this sector of the tourism industry and about yourself, how well suited to a career in this area do you think you are? Be sure to explain your reasons.

Teamwork

c. Now share your work in a. and b. with a study partner, family member, or friend. How accurate do they find your personal assessment? Who do you think is closer to the truth?

Task Management

2. Check your local newspapers, periodicals relating to the tourism industry, and any other appropriate publications (or try the Internet if you have access to it). Look for job advertisements in the events-and-conferences sector of the industry. Your librarian should be able to help you with this. As you find ads, write down the qualifications for each one. Make a list of the qualities, skills, and training that seem in demand for careers in this area and compare them to yourself.

a. How well do you compare? Explain your answer.

b. What experience, education, and training do you think you'll need if you're someday to qualify for jobs in this sector?

Technology

If you're really interested in working in this area of the tourism industry, keep checking those ads and expanding your list. Try, as well, to read all you can in appropriate books and periodicals about the events-and-conferences sector. The more you learn, the better able you'll someday be to actively pursue a career in this area.

**Compare your answers with those in the Appendix, Section 3: Extra Help.**

WESTFILE INC.

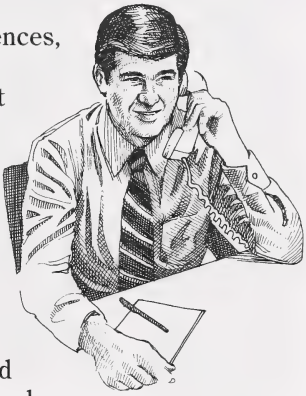
## Enrichment

Do **one** or **both** of the following:

Careers

Task Management

1. In Activity 2 you were introduced to the term *job shadowing.* Job shadowing is a wonderful way to get a first-hand look at what an occupation or position actually involves. Carefully watching someone actually doing a job—and, whenever possible, discussing what he or she is doing—will give you a much more accurate feeling for the job than reading or hearing about it can ever do.

   If you're genuinely interested in learning more about working in the area of planning meetings and conferences, try to arrange a day or two that you can spend with someone on the job (if at all possible, it would be best to do this with the help of your learning facilitator or career counsellor). This will involve writing or telephoning an appropriate person or business, explaining that you're a tourism studies student, and politely requesting a chance to shadow the person on the job. You may be turned down by some people you approach; they may simply feel that they're too busy at the time. However, if you keep trying, you should find someone willing to spend the time with you that you require. After all, most people would be flattered to learn that a student found their job interesting enough to want to spend time with them as they went about their daily tasks.

   Once you've set up a job-shadowing situation, here are a few things to bear in mind if you're to get the most out of it that you can:

   - Take notes of what the person does. The form that follows shortly might come in handy.
   - Keep asking yourself if you'd enjoy doing these kinds of tasks.
   - Whenever you get the chance, record your own feelings about the job.
   - Be sure not to get in the way of the person doing the job and other workers in the area. Don't ask questions while the person you're with is working; jot them down and ask them at the first convenient opportunity.
   - Find out whether the day or days you've witnessed are typical. Ask what other tasks the person normally does.
   - Find out how much the person's day-to-day tasks have altered in the last few years. Ask how the person thinks they'll change in the years to come.
   - Thank the person you've shadowed when the project is over. It's always a good idea to follow up with a brief thank-you note a day or two later.

Here's the sort of form you can create for a job-shadowing project. Feel free to modify it as you see fit.

**JOB-SHADOWING INFORMATION**

**Position Title:** ____________________ **Company:** ____________________

**Name of Person Shadowed:** ________________________________________

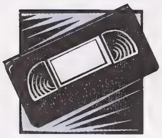
| Time | Tasks Carried Out | Comments and Observations |
|---|---|---|
| **Hour 1** | | |
| **Hour 2** | | |

Communication

When you've finished your job-shadowing project, write up what you've learned about the position in a report. Include things like

- the duties the job entails
- the hours worked
- the skills the job requires
- the training the job requires
- the personal qualities and aptitudes the job requires
- what you liked about what you saw
- what you didn't like
- your own suitability for the position

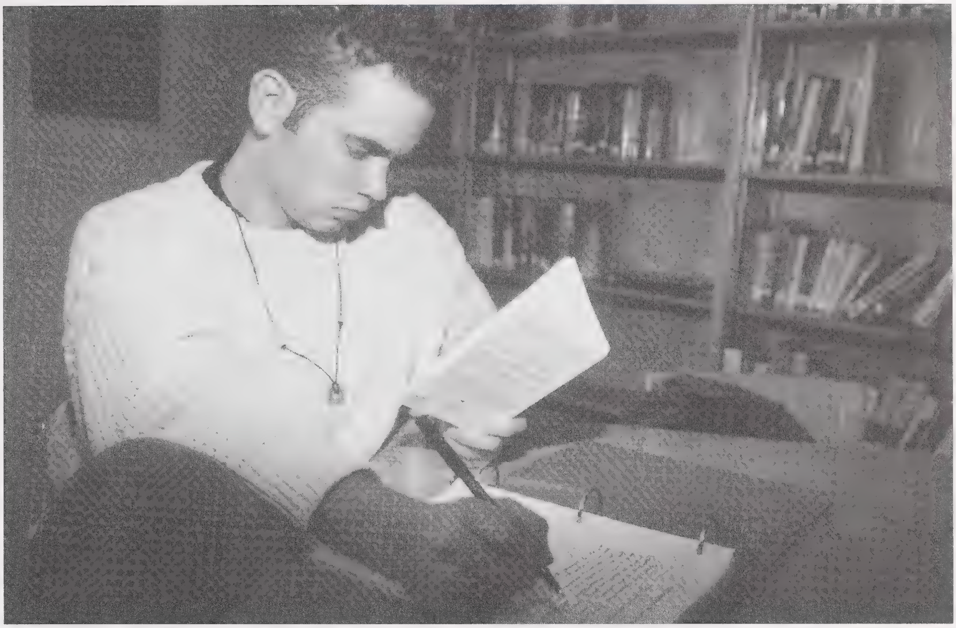
Share your report with your class, study partner, or family members. Try to get questions and feedback from them. This sort of thing can often prompt new ideas and fresh insights.



2. If you haven't watched it as part of a previous course in tourism studies try to get hold of and watch the short ATEC Career Awareness Video *Joining Alberta's Best*. A component of the *Joining Alberta's Best Resource Kit*, this videotape will give you a lively, up-to-date, and informative introduction to the possibilities of a career in tourism. Because it looks at tourism in general, it won't give much specific information on the events-and-conferences sector, but in an industry where there's so much overlap of skills and experience, you should be aware of the big picture. Who knows? Perhaps this video will put you on to ideas for jobs in tourism that you hadn't even thought of.

**Compare your answers with those in the Appendix, Section 3: Enrichment.**

# CONCLUSION



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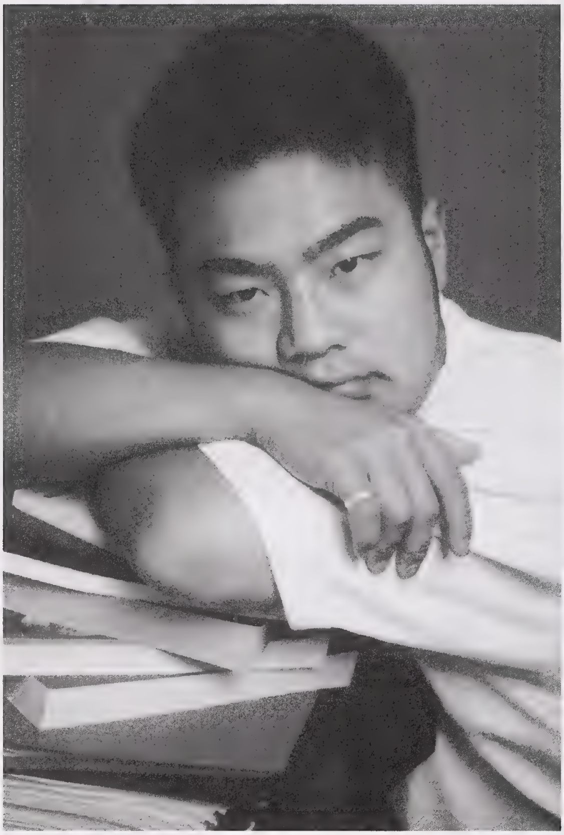
In this section of the module you've researched career opportunities and training programs in the area of planning meetings and conferences and you've learned how to assess yourself as a candidate for jobs in this sector of the industry. You should now have some idea of the opportunities out there and how to go about taking advantage of them. Perhaps more importantly, you've learned how to do research in the area of careers and training; that means that if you're interested, you can continue to learn about jobs and educational opportunities as you want to. Remember, the more informed you are, the better able you'll be to make wise decisions about your future; so keep up the research!

**ASSIGNMENT**

Turn to your Assignment Booklet and do the assignment for Section 3.

# MODULE SUMMARY



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This module has given you the opportunity to learn about the importance of meetings and conferences to the tourism industry. Conventions, congresses, conferences, and other meetings held every day all over the world play a major role in the industry, creating jobs, generating revenue, and complementing the work carried out by other parts of the industry—such as the accommodation, transportation, and food-and-beverage sectors.

Having completed this module, you should have a good basic understanding of how meetings and conferences are planned as well as an awareness of the job possibilities in this area of the industry. You should now be in a position to continue learning more and more about the events-and-conferences sector and to research employment and educational opportunities within it. If you feel that this is an area holding career possibilities for you and you keep doing your research, you may well be on your way to employment in a rapidly expanding and exciting industry.

# COURSE SURVEY FOR
# JOB OPPORTUNITIES IN MEETINGS AND CONFERENCES (TOU 205)

***After you have completed the assignments in this module, please fill out this questionnaire and mail it to the address given on the last page. This module is designed in a new distance learning format, so we are interested in your responses. Your constructive comments will be greatly appreciated, as future course revisions can then incorporate any necessary improvements.***

Name ______________________

Age ☐ under 19 ☐ 19 to 40 ☐ over 40

Address ______________________

______________________

______________________

File No. ______________________

Date ______________________

## Design

1. The Student Module Booklet contains a variety of self-assessed activities. Did you find it helpful to be able to check your work and have immediate feedback?

   ☐ Yes ☐ No If yes, explain.

   ______________________

   ______________________

   ______________________

2. Were the questions and directions easy to understand?

   ☐ Yes ☐ No If no, explain.

   ______________________

   ______________________

   ______________________

3. Each section contains Follow-up Activities. Which type of Follow-up Activity did you choose?

   ☐ mainly Extra Help
   ☐ mainly Enrichment
   ☐ a variety
   ☐ none

   Did you find these activities beneficial?

   ☐ Yes ☐ No If no, explain.

   ______________________________________________

   ______________________________________________

4. Did you understand what was expected in the Assignment Booklet?

   ☐ Yes ☐ No If no, explain.

   ______________________________________________

   ______________________________________________

5. The course materials were designed to be completed by students working independently at a distance. Were you always aware of what you had to do?

   ☐ Yes ☐ No If no, provide details.

   ______________________________________________

   ______________________________________________

6. This distance learning course may include an assortment of drawings, photographs, and charts.

   a. Did you find the visuals in this course helpful?

      ☐ Yes ☐ No Comment on the lines below.

      ______________________________________________

      ______________________________________________

   b. Did you find the variety of visuals in this course motivating?

      ☐ Yes ☐ No Comment on the lines below.

      ______________________________________________

      ______________________________________________

7. Suggestions for audiocassette, videocassette, and computer activities may have been included in the course. Did you complete these media activities?

   ☐ Yes ☐ No Comment on the lines below.

   ______________________________

   ______________________________

**Only students enrolled in a Junior High course need to complete the following question.**

8. The Student Module Booklet may have directed you to work with your learning facilitator. How well did you work as a team?

   Student's comments: ______________________________

   ______________________________

   ______________________________

   ______________________________

   Learning facilitator's comments: ______________________________

   ______________________________

   ______________________________

   ______________________________

## Course Content

1. Was enough detailed information provided to help you learn the expected skills and ojectives?

   ☐ Yes ☐ No Comment on the lines below.

   ______________________________

   ______________________________

2. Did you find the work load reasonable?

   ☐ Yes ☐ No If no, explain.

   ______________________________

   ______________________________

3. Did you have any difficulty with the reading level?

☐ Yes ☐ No Please comment.

4. How would you assess your general reading level?

☐ poor reader ☐ average reader ☐ good reader

5. Was the material presented clearly and with sufficient depth?

☐ Yes ☐ No If no, explain.

## General

1. What did you like least about the course?

2. What did you like most about the course?

## Additional Comments

**Only students enrolled with the Alberta Distance Learning Centre need to complete the remaining questions.**

1. Did you contact the Alberta Distance Learning Centre for help or information while doing your course?

   ☐ Yes ☐ No If yes, approximately how many times? ______

   Did you find the staff helpful?

   ☐ Yes ☐ No If no, explain.

   ____________________

   ____________________

2. Were you able to fax any of your assignment response pages?

   ☐ Yes ☐ No If yes, comment on the value of being able to do this.

   ____________________

   ____________________

3. If you mailed your assignment response pages, how long did it take for their return?

   ____________________

   ____________________

4. Was the feedback you received from your correspondence or distance learning teacher helpful?

   ☐ Yes ☐ No Please comment.

   ____________________

   ____________________

   ____________________

   ____________________

Thanks for taking the time to complete this questionnaire. Your feedback is important to us. Please return this questionnaire to the address on the right.

If you are enrolled at the Alberta Distance Learning Centre and will be mailing your Assignment Booklet to ADLC, you may return this questionnaire with the Assignment Booklet.

Instructional Design and Development
Alberta Distance Learning Centre
Box 4000
Barrhead, Alberta
T7N 1P4

# APPENDIX

## Glossary
## Suggested Answers

# Glossary

**agenda:** a plan of things to be done

**amenities:** things that provide people with comfort and convenience

**association:** an organized group of people sharing the same interest or belonging to the same profession

**budget:** the amount of money available for a specific purpose or a plan for the balancing of revenue (or income) and expenses

**career path:** the sequence of jobs a person follows, usually in a chosen occupation or industry or aiming at a specific goal

**conference:** a large meeting in which information is exchanged, problems are tackled, and new developments are dealt with

**congress:** a formal conference that attracts delegates from a number of countries

**convention:** a meeting—often large and usually held at regular intervals—that normally involves group sessions, workshops, and special events

Typical conventions host groups such as professionals (doctors, dentists) or people in the same line of business.

**convention centre:** a large facility built to accommodate major conventions and conferences

**delegate:** a person attending a meeting often representing a specific company or organization

**entry-level job:** a job requiring no background experience and minimal training and skills

**exhibition/trade show:** a large event that involves people in a particular line of work or sharing a particular interest getting together and displaying their products to the public

**indirect suppliers:** businesses that play a role in the tourism industry by supplying subsidiary services

**job profile:** a concise description of the duties and requirements of a specific position

**job shadowing:** sticking very closely to someone in a particular job for a specified period of time to experience just what that job involves

**market:** sell, promote, and advertise a product or service; bring buyers and sellers together

**marketing plan:** a systematically developed strategy for promoting or selling a product or service

**meeting:** a generic term often used to describe all sorts of group get-togethers—conventions, conferences, symposiums, and so on

**meeting plan:** a plan drawn up at the start of the process of organizing a meeting to provide a general overview of the project

**program book:** a multi-paged document, given to meeting delegates, that outlines the program

**program sheet:** a one-page document, given to meeting delegates, that outlines the program

**promotion:** encouraging people to buy a product or service or to do something or behave in a particular way

**resources:** available assets; things one can use to put a plan into effect

**revenue:** income; money brought in

**seminar:** a short educational session, normally involving a relatively small number of participants

**sponsors:** people or groups that contribute money or goods—often in return for the right to advertise their own products or services

**symposium:** a formal meeting in which several expert speakers speak on and debate a topic or a variety of related topics

**tourism:** an activity in which people visit places and other people outside their own communities (except for daily commuting)

**tourism industry:** the collection of businesses and organizations that provide products and services for travellers

**workshop:** a hands-on training session that usually involves both instruction and participation

# Suggested Answers

## Section 1: Activity 1

1. This module will be concerned with the sector of the tourism industry normally called *events and conferences.*

2. Some of the chief benefits of holding meetings of this sort are that they give people the chance to

    - share information
    - resolve issues
    - learn about new developments in their field
    - network and make contacts
    - relax and have fun
    - visit different cities and regions

3. Responses will vary. Most students are aware of the annual teachers' convention but probably aren't aware of many other such meetings. In fact, most professional organizations—as well a many other groups—hold regular conventions.

4. Responses will vary. Teachers, like people in other lines of work, hold conventions to keep up-to-date in their field, develop as professionals, discuss new developments, and get to know other people in the same line of work with whom they can share ideas and strategies. And of course recharging their batteries by breaking their regular routine is an added bonus.

5. According to the text, we're living in the information age—a period in which it's vital to have fast access to new information and to be able to communicate with others quickly. Attending meetings of various types is one good way to accomplish these things and to build networks of people involved in the same work or with the same interests.

6. Examples will vary. Compare yours to the ones that follow.

| ORGANIZATIONS | EXAMPLES |
|---|---|
| associations | convention of school trustees |
| corporations/business | store managers' retreat for retail chain |
| government | training sessions on new computer software |
| specialty group | Boy Scouts' jamboree |

7. Members of associations normally take pride in their membership and in what they do. They regard the opportunity to learn new things and to develop professionally as highly desirable. They also enjoy getting to know other people who share their interests. For reasons like these, members of associations are usually willing to incur expenses to attend conventions.

8. Responses will vary somewhat. You may, in your answer, have simply listed types of businesses—restaurants, for example. If you tried to be as specific as possible, however, you may have named individual businesses—such as Moe's Delicatessen. Compare your list to the following one, bearing in mind that it's only a set of general ideas.

   a.
   - restaurants
   - motels, hotels, and other accommodation facilities
   - a convention centre—if you live in a city
   - taxi companies, bus lines, and other transportation businesses
   - car-rental agencies
   - night clubs and other sources of entertainment
   - souvenir stores
   - air lines—if you live in a major centre
   - museums, parks, gardens, and so on
   - gas stations

   b.
   - retail stores in general
   - companies supplying foodstuffs to restaurants
   - companies supplying services to hotels—for example, laundry businesses
   - liquor stores
   - grocery stores
   - automotive repair businesses

   Did you think of other businesses that would profit?

9. There is no suggested answer for this question.

## Section 1: Activity 2

1. a. symposium
   b. workshop
   c. convention
   d. exhibition
   e. congress
   f. seminar
   g. conference

   There may be room for disagreement over some of these labels; the fact is that they aren't always used precisely in the same way. Throughout this course you'll find the word *conference*, for example, being used to describe any large meeting. Note, too, that large meetings, such as conventions and congresses, generally have a number of smaller meetings—such as seminars and workshops—taking place within them. These smaller meetings are often all referred to in a general sense as **sessions**.

2. Answers will vary. If you live in a big city, there will be many conferences taking place close to you throughout the year, but you may not be very aware of them. Ironically, if you live in a small town, though there will be far less of this sort of thing going on, you're likely to be more aware of just what is occurring in your community. Often agriculture-related conferences will take place in smaller communities, along with conferences on other topics directly related to the rural environment. Many small communities also have annual trade fairs or other exhibitions put on by local groups. And of course, on a smaller scale, all sorts of meeting are going on: schoolboard meetings, workshops of one sort or another, information seminars, and so on.

## Section 1: Activity 3

1. Maria works with conference planners of the associations holding conferences. She gets all the information about the sort of conferences these people want, and then she sets to work arranging things—registrations, tours, exhibitions, audiovisual requirements, entertainment, and so on. She contacts many people to arrange bookings and organize tours, buses, and schedules. It's Maria's responsibility to give the planners what they want and to see to it that things are done on schedule and work out the way the planners want them to. Sometimes, as well, Maria has to make presentations to companies planning conferences in an attempt to get their business for her company.

2. A conference coordinator works directly with the conference planners from the organizations holding conferences.

3. Answers will vary somewhat. According to the passage you've read, it seems safe to say that conference coordinators should

   - be highly organized
   - enjoy working with people
   - be able to pay attention to the smallest details
   - enjoy challenges

   Did you think of other qualities?

4. Answer will vary. Sometimes it's hard to assess your own strengths and weaknesses. Why not discuss your answer with someone who knows you well, such as a family member?

5. Charts will vary somewhat. Compare yours to the one that follows.

## ORGANIZATIONS INVOLVED IN CONFERENCE PLANNING

| Organization | Description | Function |
|---|---|---|
| **Convention Planners** | small volunteer groups or professionals | plan conventions—sometimes move to the chosen location to do this |
| **Convention Centres, Hotel/ Resorts** | hosting organizations | supply people at conference with accomodation, food and beverages, space for meetings and exhibitions, and so on |
| **Convention Service Companies** | supporting organizations that work with meeting planners and people at convention facilities | provide on-site planning, organize events, look after registration and staffing, arrange leisure activities and tours, look after transportation, produce information sheets, and provide hosts, hostesses, and guides |
| **CVAs** | convention and visitor's associations: nonprofit organizations that assist centres | promote their cities and convention facilities; try to attract conventions and so create business |
| **Airlines** | in Canada, both Air Canada and Canadian Airlines involved | offer best possible fares to conference delegates and become the "official carrier"; sometimes fly CVA staff to foreign destinations to bid on contracts |
| **Governments** | all three levels involved (federal, provincial, and local) | supply funding for facilities, get leads, build infrastructure, produce promotional literature, and promote convention business in many ways |

### Section 1: Activity 4

1. Response will vary. Here are some factors you might have mentioned:

   - the size of the convention (The Toronto convention centre seems able to accommodate the largest conference.)
   - the places from which delegates will be coming (Toronto and Montreal might be the best choices if most people attending will be coming from the eastern or central part of the continent while Vancouver would be more readily accessible to people farther west.)
   - the attractions the cities have to offer (For example, Montreal offers a European flavour while Vancouver has a mild climate and a beautiful setting.)
   - the proximity of the convention centres to other city attractions

- the sort of people you expect at the convention (What would they appreciate more, Toronto's big-city amentities, Vancouver's beauty, or Montreal's old-world charm?)

- the features of the convention centres themselves (For instance, is a large ballroom more important for this convention than a spacious exhibition area?)

- the proximity of the company's head office to the convention site

Were you able to think of other factors?

2. Responses will vary slightly. Compare your list to this one:

- easy access to meeting rooms
- efficient restaurants
- activities for spouses
- availability of recreational facilities

Did you come up with other ideas?

3. Compare your list to this one:

- Canada's marketing budgets are small.

- Canadian convention facilities are too small for many large American conferences.

- Canada lacks the attraction of European countries where people can hope to bump into internationally known celebrities at high-profile functions.

4. a. Responses will vary depending on where you live. If you live in a mid-size community, you probably included hotels in your answer along, perhaps, with such places as community colleges. If you're in or near a smaller community, it's likely that places like schools, church halls, recreation centres, and community centres are the facilites used most often for meetings.

   b. Again, answers will vary. Did you consider such things as workshops and seminars on various topics of public interest, public meetings to discuss issues of concern in the community, talks given by religious speakers, and school-related information sessions? Of course most meetings of this sort don't require the sort of large-scale planning that the events-and-conferences sector of the tourism industry directly involves itself in, but they can be a boost to local businesses such as motels, restaurants, and gas stations.

5. Answer will vary somewhat. Here's one example.

Because the city in which the convention will be held has already been decided on, this is one thing you won't have to consider. You do, however, have to select a facility. One thing you should consider is size, but this is easy: with only one hundred people attending, almost any hotel will be big enough and certainly using a large convention centre is out of the question. But while most hotels would suffice in terms of size, you also have to consider that demonstrations are planned, and some hotels won't have the equipment you'll need, such as tables, audiovisual equipment, and so on.

Another thing you'll probably want to consider is the recreational and leisure-time interests of the delegates. After all, people will be coming from across the country to a city that offers a great deal to see and do. So there would likely be some resentment if you booked a hotel miles away from the city centre, with its restaurants, stores, and nightlife. On the other hand, you'll have to ensure that there are good transportation links with the airport since most of the delegates will be flying in.

In short, you should be looking for a relatively small, cost-competitive hotel in the heart of Toronto that can supply the space and equipment needed to display and demonstrate the new toy line.

b. If you live in or near a larger community, you'll certainly be able to find a hotel that could accommodate a conference of a hundred people in need of space and equipment for displays and demonstrations. You should also be able to supply adequate leisure-time facilities, though, of course, it's difficult to compete with Toronto. If you're in a smaller community, you may well find facilities adequate to do the job too, but there are likely to be some drawbacks. Your community may be able to supply some novel opportunities with regard to entertainment and tours of the area. Be sure to write up your evaluation so as to list both the advantages and disadvantages of the facility you're assessing.

## Section 1: Follow-up Activities

### Extra Help

1. Conferences benefit many people. The groups holding them are able to share ideas, tackle problems, and get to know each other better. The businesses directly involved in organizing them and putting them on—such as convention centres and convention service companies, benefit financially, as do other businesses throughout the tourism industry, from airlines to party caterers. Other businesses, that supply businesses in the tourism industry, also benefit financially—laundry companies, for instance, and restaurant suppliers. Finally, money trickles down throughout the community in which people attending a convention shop, eat, and enjoy themselves.

2. Reponses will vary somewhat. Compare your ideas to these:

   - motels and hotels
   - restaurants
   - stores
   - gas stations
   - recreational facilites—for instance movie theatres, lounges, and golf courses
   - taxi companies

   Were you able to think of others? Did you manage to name specific businesses, such as Marie's Food and Gas?

3. a. symposium
   b. exhibition or trade show
   c. convention
   d. seminars
   e. workshop

4. Because the delegates to the conference will be older people, it's important that the facility be easy to get to; so probably a central location would be best—the city of Red Deer, for example. It's unlikely that many of the participants will be taking part in very active recreational pursuits, so proximity to things like a ski hill wouldn't be a prime concern—though with the active lifestyles maintained by many senior citizens these days, don't rule out all recreation of this sort. Of course restaurants and movie theatres should be close by, and transportation should be easy. You should also look for a hotel that offers facilites designed to assist elderly and disabled people, such as easily accessible doors, grab-bars in the shower, and perhaps wheelchair ramps. Did you think of anything else?

### Enrichment

1. If you were lucky enough to find someone willing to speak with you, you should have learned a good deal. Were you surprised by anything you learned? Now that you've made a contact, try to keep it up. If you feel your interviewee wouldn't feel put upon, why not ask if you could sit in some time on some actual planning for a conference? It should be quite an eye-opener.

2. There's no suggested answer for this question, but it should have made you aware of how impressive—and expensive—convention centres can be. The convention business is a fast-growing one, and a great deal of money can be spent in creating facilities that will attract conferences from around the world.

## Section 2: Activity 1

1. You may have varied the format of your plan somewhat, but basically it should look like this:

### THE MEETiNG PLAN

**Client's Name:** ______________________________

**Purpose of the Meeting:** ______________________________

______________________________

**Subject or Theme:** ______________________________

______________________________

**Target Group:** ______________________________

______________________________

**Scope of the Event:** ______________________________

______________________________

**Name and Date of the Event:** ______________________________

______________________________

**Organizing Group/Leader:** ______________________________

______________________________

**Number of Participants:** ______________________________

______________________________

**Group Responsibilities:** ______________________________

______________________________

2. Completed forms may vary somewhat, but they should all contain the following information.

### THE MEETING PLAN

**Client's Name:** Bradford Real Estate (Ms. Desirée Halvorsen)

**Purpose of the Meeting:** improvement of selling techniques; sharing ideas; relaxation

**Subject or Theme:** marketing real estate in our changing economy

**Target Group:** all employees of the company and partners

**Scope of the Event:** closed to company personnel and partners

**Name and Date:** Bradford's Annual Convention, April 12–14

**Organizing Group/Leader:** Mr. Claude O'Brien

**Number of Participants:** 500 (approximately)

**Group Responsibilities:** committees for accommodation, food and beverage, session arrangement (see C. O'Brien for details)

## Section 2: Activity 2

1. a. Responses will vary somewhat. Compare your list to this one:

    - planes
    - intercity busses
    - trains
    - taxis
    - rental cars
    - shuttle busses

   b. Responses will vary somewhat, but essentially a planner must consider the following points:

    - the location of the event
    - the locations from which participants will be coming and their probable times of arrival
    - costs of various transportation options
    - availability and efficiency of various transportation options

   Did you think of other considerations?

2. Responses will vary. Here are two ideas with which you can compare your own, but there are many other possibilities.

    - It must be determined whether the client group would prefer individual menus at meals or buffet-style service. Usually the latter system is less expensive, especially when large groups are being served; however, some clients prefer the more formal approach.

    - It must be decided whether or not the client group wants a reception, banquet, or some other sort of function to mark the closing of the conference. This sort of thing adds to the cost of the conference, but many people expect and enjoy a formal affair to wrap up several days of meetings.

3. The form you created will, of course, differ from everyone else's. What follows is a form for arranging meals created by Alberta Agriculture and published in their document *A Working Guide to Planning an Event*. Your form likely won't be as complete at this one, but you can use it as a standard with which to compare your own.

## ARRANGING THE FOOD SERVICE

CATERER: ____________________

TYPE OF MEAL: ____________________

MENU: ____________________

____________________

____________________

____________________

SPECIAL REQUIREMENTS: ____________________

____________________

HEAD COUNT: ____________________

| **CHECKLIST** | **PERSON RESPONSIBLE** | **DEADLINE** | **DONE** |
|---|---|---|---|
| 1) Contact caterer | ________ | ________ | ________ |
| 2) Arrange meals | ________ | ________ | ________ |
| 3) Decide on refreshments<br>– time<br>– location | ________ | ________ | ________ |
| 4) Line up entertainment/music for meals | ________ | ________ | ________ |
| 5) Arrange for grace<br>O Canada/God Save the Queen | ________ | ________ | ________ |
| 6) Order specialty items<br>(i.e. centerpeices, linens) | ________ | ________ | ________ |
| 7) Provide final head count for meals | ________ | ________ | ________ |
| 8) Settle final payment | ________ | ________ | ________ |
| 9) Thank the caterer | ________ | ________ | ________ |

[1]

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[1] *A Working Guide to Planning an Event* (Edmonton: Alberta Agriculture, Food and Rural Development, 1989), 13. Reprinted by permission.

## Section 2: Activity 3

1. What the designers of this form have called "Select-a-Session" is there to list the various smaller seminars and workshops that participants can opt to attend in the provided time slots. This means that this form doesn't really show all the complexities with which a planner must deal in creating an agenda because all these smaller sessions must also be scheduled; and sometimes, as the form shows, there can be quite a number of them all running at once.

2. If the conference is a large one with many people to feed in a banquet hall, an hour might not allow enough time for everyone to be served and eat a meal. Again, if the conference is located somewhere where participants must travel some distance to find restaurants (not a good planning practice!), more time will be required for meals.

   Did you think of other situations?

3. A keynote speaker is someone who speaks at a general session which everyone at the conference can attend. Normally the topic of the speech will be closely related to the theme or focus of the conference. Very often keynote speakers are scheduled to talk at the beginning of a conference or at the start of each day of a conference that's several days long. Here the keynote address will be at the end of the day.

4. What follows is just one example of a program-sheet. Your own may be very different, but compare the two. Who knows? Yours may well be better.

# ABC Construction Co. presents...
# its 10th Annual Convention
# May 1, 199__

### *Topics and Speakers*

| | |
|---|---|
| • **Building Materials of the 21st Century** | Mr. I. MacPherson |
| • **Safety Is Everyone's Priority** | Ms. Alanna Aboud |

| | |
|---|---|
| ***Registration*** | **8:15 - 9:00** |
| ***Session 1—**Mr. MacPherson* | **9:00 - 12:00** |
| ***Coffee Break*** | **10:15 - 10:30** |
| ***Lunch buffet*** | **12:00 - 1:00** |
| ***Session 2—**Ms. Aboud* | **1:00 - 2:30** |
| ***Coffee Break*** | **2:30 - 2:45** |
| ***Workshops*** | **2:45 - 4:00** |
| ***Reception and Dinner*** | **5:00 - 7:00** |

5. Ideas will vary somewhat. Here are a few things you might include in the pamphlet:

   - a detailed agenda of the conference, including precise times and locations of sessions and displays
   - information of participating hotels, including price ranges and phone numbers
   - a list of other nearby hotels and/or motels along with price ranges and phone numbers
   - a simple map of the downtown area, including the location of hotels, restaurants, and so on
   - floor plans of the particpating hotels showing where sessions will be held and displays set up
   - registration procedures and hours
   - exhibition hours and location
   - location of first-aid stations
   - smoking policies
   - child-care services
   - partners' programs
   - shuttle-bus services (and other travel information)

   Did you think of anything else that participants might want to know?

## Section 2: Activity 4

1. Responses may vary slightly, but should look more or less like these:

   a. anyone in the workforce, along with their partners, but principally those approaching retirement

   b. members of the general public

   c. people who do most of the cooking for themselves or their families—especially those who are health conscious and/or having to watch their budgeting carefully

   d. university students and academics (You may not know who Immanuel Kant was, but clearly this is an academic subject unlikely to arouse a great deal of public interest.)

   e. the general public

   f. outdoors enthusiasts—hunters, hikers, and others who enjoy outdoor activities

2. a. Ideas will vary. Compare yours to these:

      - putting posters up in the school and around the community
      - having announcements made over the school public-address system
      - sending a notice home to parents with each student
      - having the meeting advertised on a local radio station
      - asking students to "talk up" the meeting and the proposed renovations with family and friends

      Did you come up with any other ideas?

   b. You'll have to evaluate your own poster or ask a study partner or family member to give you some feedback. Does your poster meet the five criteria outlined in the question?

3. Again ideas will vary. Here are a few to which you can compare your own:

   - advertising the event using the methods you came up with for question 2
   - asking local merchants to contribute prizes for games and draws
   - having activities for people of all ages—from face painting to horseshoes
   - giving away free passes through competitions on a local radio station
   - asking well-known local people to help out

4. You'd probably like to get the names of reputable hotels and motels in a variety of price ranges along with suggestions for good restaurants nearby. You might also appreciate a map of the part of the city you'll be in and directions to the conference site. As well, a few ideas on recreational features of the area might come in handy—golf courses, swimming pools, museums, and so on.

   Could you think of anything else?

## Section 2: Activity 5

1. Following is the Master Equipment Checklist taken from Alberta Agriculture's *A Working Guide to Planning an Event.* Compare your list to this one. Did you miss anything? Did you think of things not involved in this list?

### MASTER EQUIPMENT CHECKLIST

Person responsible for equipment arrangement: ____________________

| EQUIPMENT (fill in total number needed) | SESSIONS NEEDED FOR | EQUIPMENT SOURCE | PICK UP DATE |
|---|---|---|---|
| 1) ______ Flipcharts, tape, markers | ______ | ______ | ______ |
| 2) ______ Overheads, markers | ______ | ______ | ______ |
| 3) ______ Film projectors | ______ | ______ | ______ |
| 4) ______ Slide projectors | ______ | ______ | ______ |
| 5) ______ Extension cords | ______ | ______ | ______ |
| 6) ______ Microphones/cords | ______ | ______ | ______ |
| 7) ______ Lecterns/podiums | ______ | ______ | ______ |
| 8) ______ Screens | ______ | ______ | ______ |
| 9) ______ Video players | ______ | ______ | ______ |
| 10) ______ T.V.s | ______ | ______ | ______ |
| 11) ______ Video camera for taping session | ______ | ______ | ______ |
| 12) ______ Camera for pictures | ______ | ______ | ______ |
| 13) ______ Lighting | ______ | ______ | ______ |
| 14) ______ Computers | ______ | ______ | ______ |
| 15) ______ Other | ______ | ______ | ______ |

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[1] *A Working Guide to Planning an Event* (Edmonton: Alberta Agriculture, Food and Rural Development, 1989), 17. Reprinted by permission.

2. Responses to this question will vary greatly. You may have listed only major things, or you may have included a great many details. If you've actually been involved in organizing activities of this sort, you probably have a better appreciation of just how many little things there are to see to. What follows is one person's list of ideas in no particular order. Compare it to your own.

   - Arrange with janitor to get a key to room where chairs are stored.
   - Appoint someone to organize refreshments.
   - Organize crew to set up and take down chairs and refreshment tables.
   - Get keys for washrooms; be sure they're unlocked.
   - Set up signs to gym for people unfamiliar with school.
   - Arrange to have sound system set up and functional.
   - Have programs (agenda sheets) made up and run off.
   - Appoint students to welcome participants, hand out programs, and direct people to seating.
   - Arrange for speakers; be sure they know when and where they'll be speaking.
   - Organize crew to clean up after meeting.
   - Have wastebaskets handy near refreshment tables.

   As you can imagine, this kind of list can go on and on. Thinking about details like these should help you understand how important an organized plan is for those people working to make a meeting a success.

## Section 2: Activity 6

1. The chart given in Activity 2 looked like this:

| REVENUE | EXPENSES |
|---|---|
| • registration fees | • advertising |
| • money from sponsors | • facility rental |
| • grants | • entertainment |
| • money from exhibitors | • salaries |
| | • food-and-beverage expenses |

2. The actual amounts from the last event can give planners a solid basis from which to estimate costs for the event being planned. Of course things change (they usually become more expensive), but at least planners have a benchmark this way.

3. Yes, it did. In fact, the event made a $50.00 surplus. This can be determined by subtracting the total expenses ($1420.00) from the total revenue ($1470.00)

4. a. The planners were wrong in several places, but their biggest miscalculations occurred in the areas of registration fees and revenue from donations (from sponsors). Obviously they overestimated in both categories.

   b. The planners could pay closer attention to the revenues brought in by the last event held. They could also work harder at promoting the event (to increase registration numbers) and at soliciting funds from sponsors. Another idea might be to increase registration costs, but this might discourage people from participating at all.

   Did you come up with other ideas?

## Section 2: Activity 7

1. Questionnaires will all be different, but use the one that follows as a sample. You may have decided on an entirely different format.

### YOUR THOUGHTS ON THE MEETING

**Because this is the first of what we hope will be a series of meetings designed to generate ideas for our renovation project, we'd like your ideas on how to improve the way we're doing things. Please take a few minutes to answer the questions that follow, and leave your completed questionnaire on the table by the door as you leave the gym. There is no need to sign your name unless you want to. Thank you for your cooperation.**

**1. Did you find today's meeting to be well organized? If not, please provide details.**

______________________________

______________________________

**2. Was the meeting site appropriate and convenient? If not, please explain why.**

______________________________

______________________________

**3. Were the time and day of the week convenient? If not, please suggest a more appropriate time and day.**

______________________________

______________________________

**4. Could you see and hear the speakers well?**

______________________________

**5. Was the format conducive to a fair exchange of ideas? If not please give reasons.**

______________________________

______________________________

**6. Were the refreshments satisfactory? If not, please suggest improvements.**

______________________________

______________________________

**7. What did you like most about the meeting? Why?**

______________________________________________

______________________________________________

**8. What aspects of the meeting do you think could be improved? Please provide suggestions on how this can be done.**

______________________________________________

______________________________________________

**Other comments:**

______________________________________________

______________________________________________

2. Again, all questionnaires will be different, but here's one example.

## AN EVALUATION OF OUR FIRST MEETING

**We've all worked hard to make this meeting a success, but our job is only beginning. Please take some time to fill out the questionnaire that follows and leave it in the box by the backstage door of the gym. Don't sign your name unless you want to.**

**1. Do you think we did a good job in advertising the meeting? If not, how could we improve things next time?**

______________________________________________

______________________________________________

**2. Did you feel that your responsibilities were clearly worked out and explained to you? If not, where could improvements be made?**

______________________________________________

______________________________________________

**3. Were you given the help you needed to do your job? If not, how could things be done differently?**

______________________________________________

______________________________________________

**4. Was everything communicated clearly? If not, please provide details.**

________________________________________

________________________________________

**5. Do you feel the work load was evenly distributed? If you don't, how do you think we could do better?**

________________________________________

________________________________________

**6. What do you think worked best in the organizing of this meeting?**

________________________________________

________________________________________

**7. What areas in particular need more work?**

________________________________________

________________________________________

**Further comments:**

________________________________________

________________________________________

________________________________________

________________________________________

Note that in a questionnaire it's important to phrase questions positively; what you're after is positive—never negative—criticism. If someone on the team feels that he or she ended up doing more than a fair share of work, you don't want that person's response on the questionnaire to be simply a lot of complaining and finger-pointing. Rather, you want the person to stop and think of ways in which tasks could be more fairly distributed and the whole process better monitored next time.

## Section 2: Follow-up Activities

### Extra Help

1. Responses will vary somewhat. Compare your form to the one that follows; note that some information has been made up.

## THE MEETING PLAN

**Client's Name:** J.L. Peterson Jr.–Sr. High School

**Purpose of the Meeting:** to inform public of gym situation and generate a plan to raise money

**Subject or Theme:** "A new gym for J.L. Peterson"

**Target Group:** students, families, community members, local business people

**Scope of the Event:** open to everyone—the more the better

**Name and Date:** October 14—no name

**Organizing Group/Leader:** Mr. C. Beaudoin, Phys. Ed. teacher

**Number of Participants:** probably between 300 and 400

**Group Responsibilities:** teams for promotion, food and beverages, agenda, and speakers; leaders to be determined

2. Resource lists will vary. Of course some of the things, you looked at in Activity 2 don't really apply to a school dance—accommodation, for instance—and lists should be adapted accordingly. What follows is one person's list. Your own may be more—or less—complete.

    - **facility:** Permission to use the gym must be obtained and a key provided for. Arrangements must be made to decorate the gym before the dance and clean it up afterward.
    - **budget:** Costs and revenues must be projected. The amount presently in the bank account has to be ascertained. Fund-raising activities may have to be undertaken.
    - **entertainment:** Someone must be found to act as deejay. A sound system has to be set up and tapes and CDs obtained.
    - **refreshments:** People must be selected to set up and look after the booth. Pop and food has to be bought.
    - **safety and security:** Arrangements must be made for teachers/parents to be present. Other security measures should be worked out with principal.

    Of course if you've actually been involved in organizing this kind of event, you'll know that there's a great deal more planning involved than this; but a preliminary list of this sort can give planners a starting point from which to work.

3. Everyone's marketing ideas will be different. Here are one person's suggestions:

    Posters should be created and put up around the school. Announcements should be made over the school PA system. A theme should be created and the gym decorated accordingly—maybe a retro theme back to the sixties or seventies complete with appropriate music? Perhaps the week of the dance there could be a contest of some sort and the winners would get free tickets. At the dance there could be a draw and a contest of some kind with prizes. (For instance, a prize for the couple with the best seventies look?)

4. Here's what your calculations should look like.

## OLSEN FAMILY REUNION

| | Projected Cost |
|---|---|
| EXPENSES | |
| **FIXED EXPENSES** | |
| Facility | $ 275.00 |
| Band payment | 800.00 |
| Catering | 650.00 |
| **VARIABLE EXPENSES** | |
| Name Tags | $ 45.00 |
| Game Prizes | 300.00 |
| Miscellaneous | 250.00 |
| Total Expenses: | $2320.00 |
| REVENUE | |
| **VARIABLE REVENUE** | |
| Per person contributions (179 x $12.00) | $2148.00 |
| **FIXED REVENUE** | |
| Last year's surplus | $ 210.00 |
| Total Revenue: | $2358.00 |
| Profit/Loss:<br>(Total Revenue – Total Expenses = Projected Profit/Loss) | +$ 38.00 |

Assuming these projected figures hold true, the reunion should come in under budget—with a $38.00 surplus.

## Enrichment

1. There's no suggested answer to this question. If you were able to attend and critique a meeting, you've gained some valuable experience. In your report, did you point out both strengths and weaknesses of the meeting? Did you come up with constructive ideas on how things could be improved?

   From now on, whenever you find yourself at a meeting or event of some kind, take notice of how well it seems to have been planned and organized. Keep asking yourself if things are running smoothly and whether anything could have been done to improve them. Doing this should quickly become a habit, and you'll be surprised at how rapidly you'll develop an expert eye when it comes to the planning of meetings and conferences.

2. Again this question can have no suggested answer. If you took a serious look at *The Complete Guide for the Meeting Planner*, you've probably developed a better understanding of the complexities involved in the business and the extraordinary attention to detail needed by those who plan and organize meetings. Do you now have a greater respect for meeting planners?

3. There is no suggested answer for this question. The Internet is good source of information on tourism all over the world. If you have access to it, take some time now and then just to see what you can learn about a specific country, city, province, or state. It's a great way to learn.

## Section 3: Activity 1

1. Responses will be personal.

2. Profiles will vary. What follows is a sample profile of one of the jobs outlined in the text; you can compare it with your own. Of course you may well have included a good deal more information than what's given here.

### Job #1

**Job Title:** special events coordinator

**Job Level:** supervisory

**Description of Duties:** setting goals; developing programs; marketing; arranging for food-and-beverage service, seating, decorations, transportation, security etc.

**Working Conditions:** long, irregular hours; deadline pressures; mainly indoors; working with people; great variety of tasks; many meetings

**Skills:** oral and written communications skills; ability to work with people; marketing skills; negotiations skills; planning ability; attention to detail; flexibility

**Knowledge:** thorough knowledge of all aspects of event planning; accounting; food-and-beverage sector; marketing

**Education:** recognized college or university program in tourism and/or recreation preferred, but possible to work way up from entry-level jobs

**Experience:** experience of wide variety of lower-level jobs in events and conferences and related tourism sectors a big plus; experience in planning meetings and events; minimum of several years experience at lower levels

**Career Path:** could lead to many managerial positions—for example, conference services manager, convention-centre manager, operations manager

### Section 3: Activity 2

1. Everyone's chart will, of course be different. The idea of this question isn't that you have a nice, neat-looking comparison chart, but that you learn how to acquire information on programs and courses that might interest you and that you develop the ability to compare programs. If you're serious about a career in tourism, try to gather more information on available programs and courses and get into the habit of making close comparisons. That way when the time comes, you'll be able to make a wise selection.

2. Were you able to make a choice? Did you explain your reasons clearly? If you have a study partner, did that person make the same choice you did? Questions like these should keep you thinking and reassessing the programs you're looking at. Having to defend your selection to someone else forces you to think through your reasons carefully.

### Section 3: Activity 3

1. Individual lists will vary somewhat; and of course since different positions require rather different skills, a complete master list isn't really possible. Still, there are some skills and aptitudes that seem to be important for almost any position in the sector. Here's one student's list to compare with your own.

    - an ability to work well with people
    - excellent communications skills
    - an ability to plan and organize
    - an eye for details
    - marketing and sales skills
    - flexibility/a love of novelty and new challenges
    - ambition/competitiveness
    - punctuality/an ability to meet deadlines
    - energy/an ability to work long hours
    - skill in the areas of budgeting and finance

2. a. Answer will vary from person to person.

    b. Answers will vary. The following guide isn't meant to do anything more than give you a starting place to assess your own aptitudes for a job in this sector.

        - 75% – 100%: You should make an excellent candidate for work in this sector.

        - 50% – 74%: You might do well in this sector, but don't jump in until you've done some more investigating. You'll have to work on some of those skills.

- 25% – 49%: It seems unlikely that this is the area for you, but check your list again to see where you lost points. If it's chiefly in the area of skills (for example, budgeting) rather than natural aptitudes (for example, enjoying working with people), take heart: skills of this sort can be learned.

- below 25%: You'd probably be happier in some other field, but if you feel strongly drawn to this area, don't give up. There may be positions that can use your strengths while minimizing the areas you find more challenging. An interpreter, for instance, won't need skills in budgeting and finance.

c. It's a truth of life that often other people can see our areas of relative strengths and weaknesses better than we can ourselves. That doesn't mean the opinions of the person you've asked to assess you are necessarily more accurate than your own, but weigh what this person says carefully—especially if it's someone who knows you well. If this person's evaluation is very different from your own, why not ask for a third opinion?

## Section 3: Follow-up Activities

### Extra Help

1. a. Everyone's profile will, of course, be different.

   b. 1) Answers will be personal

      2) Again, answers will be personal. Were you able to give reasons for your answer? Having to supply reasons often forces you to think things through better than you otherwise might.

   c. Once again, answers will vary slightly. Weigh carefully what you hear from your study partner, friend, or family member; but remember, it's your opinion that will count in the end.

2. a. and b. You may not find many ads the first time you do this, but if you're interested in this sector of the tourism industry, get into the habit of checking for ads regularly. Why not start a file of ads and maintain your list of the qualities and skills they demand? Not only will this help you decide on the qualifications you'll need to acquire, but it will also give you an idea of just what sort of jobs there are out there—and how many.

### Enrichment

1. Did you find your job-shadowing experience valuable? Often students hesitate to do this sort of thing out of shyness or a lack of confidence; but once you've done it once, you'll find it's a good deal easier the second time. The fact is that as you look into career possibilities, the more job shadowing you do the better. As well as giving you first-hand knowledge of just what an occupation involves, it also creates personal contacts within the industry you're looking at. Who knows? The person you're shadowing today may be the one to hire you a year or two down the road.

2. If you took Tourism Studies 101, you may have seen this video, but it's worth seeing again. It provides an excellent overview of jobs available throughout the tourism industry. At this point, as you're just completing Tourism Studies 205, you may be feeling that you'd like a tourism career but you're not sure what sector appeals to you most. The fact is that as this video makes clear, there's a great deal of overlap of skills within tourism, and many people's career paths involve moving around the industry, getting a feel for the various sectors. So if you're unsure, the important thing is that you try to get out there and acquire some experience. It's bound to stand you in good stead whatever sector or sectors you ultimately end up working in.

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